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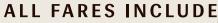
- Gain credibility with clients through a certificate and use of the 100% Pure New Zealand Specialist logo
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CRUISE





Small group tours in Europe UK and Asia

SCENIC BACK ROADS, AVOIDING MOTORWAYS - CULINARY DISCOVERIES AUTHENTIC LOCAL EXPERIENCES - LEISURELY PACED ITINERARIES HAND-PICKED BOUTIQUE ACCOMMODATION - SMALL GROUPS OF UP TO 18

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Picture a touring holiday that delves a bit deeper. One that doesn't simply drop by top sights and major cities, but invites guests to see a destination through the eyes of the people who know it best: the locals who call it home. Where journeys are made for absorbing never-to-be-forgotten views and every day is filled with culinary discoveries, authentic local experiences and hand-picked boutique accommodation.

At Back-Roads Touring, we've spent over 25 years creating small group tours that take guests to the heart of our destinations and allow plenty of time to explore hidden-gem attractions. With tour sizes of up to 18 guests (20 for French barge tours), our Tour Leaders can ensure immersive experiences and memories to last a lifetime.

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'This recent trip with your company was one of the best tours and overseas travel experiences we have done. Our guide was an exceptional Tour Leader. His knowledge, passion and personable nature made him a joy to be with every day. We were taken to beautiful towns and villages we would never have found in a million years. The tour was everything we were looking for and more.' - Judy Uren, Back-Roads Guest



WELCOME

from Jayson Westbury, Chief Executive, AFTA

AFTA IS A MEMBER DRIVEN ORGANISATION WITH A FIERCE FOCUS ON ELEVATING TRAVEL INDUSTRY STANDARDS FOR THE BETTERMENT OF ALL.

We strive to do this through advocating, representing and collaborating with a broad cross section of stakeholders and 2018 has certainly been a busy year of 'activity' for the organisation as we make every effort to represent the travel community both domestically and internationally.

The AFTA Travel Accreditation Scheme (ATAS) continues to provide extensive advantages to Australian travel agents in a deregulated market showing a clear differentiation between agency types. That is, those who are accredited; professional, trusted and legitimate businesses, and those who do not wish to stand up to the rigorous scheme criteria.

ATAS is fundamentally about futureproofing the Australian travel industry and helping consumers identify reputable, trusted travel agencies through whom they can book with peace of mind and, through compliance with the ATAS Code of Conduct and Charter, draw out best practice within an agency to ensure that the reputation of travel agent community is maintained.

With this in mind, I am extremely pleased to share that ATAS is doing the job it was intended to do. AFTA commissioned research in Quarter 1 2018 which revealed that 82% of travellers will actively seek out and book their next trip with an ATAS accredited travel agent. There is value in the reputation that comes with being accredited – 3 in 5 travellers will question a business' credibility if they can't see the ATAS logo displayed in their selling narrative¹.

Committed to helping drive consumers to Australian travel agents, AFTA undertook a re-design of its consumer website – ATAS.com.au which has resulted in a 41% increase in website visitation this year. AFTA maintained its commitment to an aggressive digital



strategy which resulted in some 8.67 million eyeballs seeing and engaging with the ATAS brand throughout 2018. AFTA also developed a new television commercial to reinforce the value of travel agents and used the consumer research to inform the campaigns messaging. The commercial reached 1.97 million consumers Australia wide.

AFTA is also very proud to have launched the AFTA Chargeback Scheme (ACS), an innovative scheme providing the first of its kind protection against consumer debit and credit card chargebacks as a result of end supplier failure. The scheme is up and running and travel agents who are already part of the scheme are reaping the benefits of its protection.

In November, we announced a new partnership with the Sydney Morning Herald and The Age *Traveller* – a partnership designed to turbocharge AFTA's consumer engagement strategy, further expanding consumer connections with travel agents as well as bringing the National Travel Industry Awards into the mainstream consumer media in 2019. I'd like to thank all those who were involved in this year's National Travel Industry Awards - an evening coined by many as the 'best yet'. AFTA is proud to be the host and producer of the Industry's Awards which are now firmly entrenched as an industry run, professional awards program designed to celebrate and recognise the many organisations that make up the Australian travel industry value chain. Our gratitude to our major sponsor Qantas and the many others who demonstrate their commitment to the Australian travel community through sponsorship, participation, the judging panel and our event suppliers.

I hope 2018 has proven to be a fruitful year and AFTA looks forward to working with you in 2019. Finally, may I take this opportunity to say thank you to the Business Publishing Group for taking on the AFTA Travel Pages this year and commend this publication to all who choose to read it.

¹ AFTA Consumer Research, FifityFive5, April 2018

AFTA BOARD MEMBERS



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Australian Federation of Travel Agents, Chief Executive

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* denotes deceased

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- Avis Australia
- betterhotel.com
- British Airways Sydney
- C&M Recruitment
- Captain Cook Cruises Pty. Ltd.
- Carnival Australia PLC
- CLS Capital Link Services Pty. Ltd.
- CoverMore Travel Insurance
- Dubai Tourism (Destination Partner)
- Emirates
- ETB News
- Garuda Indonesia
- Government of India Tourist Office
- Gow Gates Insurance Brokers Pty Ltd
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- Travel Trade Recruitment
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2018 AFTA NATIONAL TRAVEL INDUSTRY AWARDS

THE 2018 AFTA NATIONAL TRAVEL INDUSTRY AWARDS WAS A NIGHT TO REMEMBER.

Fabulous frocks, a world class culinary experience, a performance by super star Anthony Callea and the biggest pool of lucky door prizes in the 11 year history of the awards are just some of the gala dinner highlights enjoyed by guests.

Held in the Grand Ballroom of the world class venue, the International Convention Centre, the gala dinner was attended by close to 1,300 travel industry representatives from across the industry - airlines, hotels & car hire providers, tour operators, wholesalers, river and cruise operators and of course leisure, corporate and online travel agencies.

"The NTIA is the industry's only true awards, it has industry wide representation and a strong history of recognising and celebrating businesses and personnel who demonstrate outstanding service, marketing excellence and business **6** The NTIA is the industry's only true awards, it has industry wide representation and a strong history of recognising and celebrating businesses and personnel who demonstrate outstanding service, marketing excellence and business acumen within the travel industry. The event may be put on by AFTA but it is the industry who makes it a celebration to remember each and every year?

Jayson Westbury, AFTA Chief Executive

On this page:

Above left: The ICC Sydney all decked out for the NTIA Above middle: AFTA's chief executive Jayson Westbury welcoming guests to the NTIA

Above right: the crowd was encouraged to get up on their feet and dance by crooner Anthony Callea

On opposite page:

Above left: Qantas gave away a \$10,000 and \$20,000 travel voucher

Middle left: ACS was the welcome sponsor for 2018

Bottom left: Flight Centre was awarded Best Travel Agency Group, with the award presented by Qantas

Above right: Mother and daughter duo Debbi and Courtney Ashes were both winners on the night

Bottom right: Singapore Airlines hosted the After Party at The Watershed Darling Harbour













acumen within the travel industry. The event may be put on by AFTA but it is the industry who makes it a celebration to remember each and every year," said Jayson Westbury, AFTA Chief Executive.

Guests were welcomed by Dubai Tourism before AFTA Chief Executive, Jayson Westbury recognised the 2018 NTIA Sponsors, the 12 exceedingly qualified individuals on the judging panel and AFTA Life Member Spiros Alysandratos. Guests were also welcomed by major sponsor Qantas through an address from Qantas Chief Executive International, Alison Webster.

Guests were entertained by ARIA Award winner and superstar Anthony Callea thanks to Express Travel Group.

The attending airline sponsors amazed guests with over \$70,000 worth of prizes. Major sponsor Qantas made dreams come true by giving away \$10,000 and \$20,000 Qantas travel voucher. Star Alliance partnered with CATO tour operators to give away an extraordinary array of flights and land packages.

Beverage Sponsor, Air New Zealand, had guests popping, squishing and squashing grapes in a virtual game for a chance to win one of three amazing NZ wine escapes to Hawke's Bay, Christchurch and Northland – NZ destinations made famous for their world class wine.

Finally, in true travel industry style, guests continued celebrations into the early hours of the morning at the After Party thanks to Singapore Airlines, which was held at The Watershed Darling Harbour.

2018 winners included; Flight Centre, who was awarded, Best Travel Agency Group. Helloworld Business Travel won Best Non-Branded Travel Agency Group and Bicton Travel WA was heralded Australia's Favourite travel agency after receiving the most consumer votes in the People's Choice: ATAS Retail Travel Agency of the Year Campaign.

MTA – Mobile Travel Agents won the new category Best Travel Broker Network and flybuys Travel won Best Online Travel Agency. Qantas Airways was recognised for their innovative technology, the Qantas Learning Hub, in the category for Best Travel Agent Technology Innovation.

Mother and daughter from Helloworld Travel Lane Cove had plenty to celebrate as Courtney Ashes won Young Travel Agent of the Year and Debbi Ashes won Best Travel Agency Manager Retail Single Location.

A special congratulation goes to Andre Moten, Corporate Travel Management, who won Best Travel Agency Manager Corporate Multi Location for the third year running.

Michelle Nickelson from Air New Zealand won Best Sales Executive Industry Supplier after receiving a judges' commendation in 2017 and Rachel Husoy Cleary was awarded the 2018 Emirates Travel Consultant Scholarship.

AFTA congratulates all the finalists and winners and thanks the 2018 NTIA sponsors, without whom the event would not be possible.



CATEGORY 1→ BEST TRAVEL AGENCY GROUP // 50 STORES OR MORE

• Flight Centre

CATEGORY 2→ BEST NON BRANDED TRAVEL AGENCY GROUP

• Helloworld Business Travel

CATEGORY 3→ BEST TRAVEL AGENCY RETAIL // SINGLE LOCATION

Main Beach Travel

CATEGORY 4→ BEST TRAVEL AGENCY RETAIL // MULTI LOCATION

• Phil Hoffmann Travel

CATEGORY 5→ BEST TRAVEL AGENCY CORPORATE // SINGLE LOCATION

• DBT Corporate Travel

CATEGORY 6→ BEST TRAVEL AGENCY CORPORATE // MULTI LOCATION

• Stage and Screen Travel Services

CATEGORY 7 BEST NATIONAL TRAVEL MANAGEMENT COMPANY

Corporate Travel Management

CATEGORY 8→ BEST TRAVEL BROKER NETWORK

MTA - Mobile Travel Agents

CATEGORY 9→ BEST ONLINE TRAVEL AGENCY // OTA

flybuys Travel

www.flybuystravel.com.au

CATEGORY 10→ BEST BUSINESS EVENTS TRAVEL AGENCY

• Event Travel Management

CATEGORY 11→ BEST TRAVEL CONSULTANT // RETAIL

Giselle Pennington Spencer Travel Southside
 NSW

CATEGORY 12→ BEST TRAVEL CONSULTANT // CORPORATE

Nicole Hay Show Group Enterprise NSW

CATEGORY 13→ BEST TRAVEL AGENCY MANAGER // RETAIL SINGLE LOCATION

Debbi Ashes Helloworld Travel Lane Cove NSW

CATEGORY 14→ BEST TRAVEL AGENCY MANAGER // RETAIL MULTI LOCATIONS

 Renee Nightingale Helloworld Travel Albury, Wangaratta & Wodonga NSW/VIC

CATEGORY 15→ BEST TRAVEL AGENCY MANAGER // CORPORATE SINGLE LOCATION

 Jamie Maclean Corporate Traveller Cathedral Place

QLD

CATEGORY 16→ BEST TRAVEL AGENCY MANAGER // CORPORATE MULTI LOCATION

Andre Moten
 Corporate Travel Management QLD

CATEGORY 17→ YOUNG AGENT OF THE YEAR

Courtney Ashes Helloworld Travel Lane Cove NSW

CATEGORY 18→ BEST DOMESTIC AIRLINE

• Qantas Airways

CATEGORY 19→ BEST INTERNATIONAL AIRLINE // ON-LINE

Singapore Airlines

CATEGORY 20→ BEST INTERNATIONAL AIRLINE // OFF-LINE

Finnair

CATEGORY 21→ BEST CRUISE OPERATOR // DOMESTIC DEPLOYMENT

• Royal Caribbean International

CATEGORY 22→ BEST CRUISE OPERATOR // INTERNATIONAL DEPLOYMENT

Royal Caribbean International

CATEGORY 23→ BEST RIVER CRUISE OPERATOR

• APT

CATEGORY 24→ BEST TOUR OPERATOR // DOMESTIC

• APT

CATEGORY 25→ BEST TOUR OPERATOR // INTERNATIONAL

• Intrepid Travel

CATEGORY 26→ BEST CAR/CAMPERVAN RENTAL OPERATOR

• Avis

CATEGORY 27→ BEST TOURIST OFFICE // INTERNATIONAL

• Tourism New Zealand

CATEGORY 28→ BEST SPECIALTY WHOLESALER

• Bench Africa

CATEGORY 29→ BEST WHOLESALER // AUSTRALIAN PRODUCT

• Qantas Holidays & Viva Holidays

CATEGORY 30→ BEST WHOLESALER // INTERNATIONAL PRODUCT

Adventure World

CATEGORY 31→ BEST AGENCY SUPPORT SERVICE

• Air Tickets

CATEGORY 32→ BEST SALES EXECUTIVE // INDUSTRY SUPPLIER

Michelle Nickelson Air New Zealand QLD

CATEGORY 33→ BEST HOTEL/RESORT GROUP

Club Med

CATEGORY 34→ BEST REGISTERED TRAVEL INDUSTRY TRAINING INSTITUTION

Cornerstone Learning and Development

CATEGORY 35→ BEST TRAVEL WRITER // CONSUMER

Jocelyn Pride

CATEGORY 36→ BEST TRAVEL AGENT TECHNOLOGY INNOVATION

• Qantas Learning Hub Qantas Airways

CATEGORY 37→ EMIRATES TRAVEL CONSULTANT SCHOLARSHIP

Rachel Husoy Cleary Noosa Travel

QLD

CATEGORY 38→ PEOPLE'S CHOICE // RETAIL TRAVEL AGENCY OF THE YEAR

• Bicton Travel

AFTA'S 2018: 'A YEAR IN REVIEW'

JANUARY

- AFTA continues to arms members with useful resources to help them promote their business as an accredited agency as well as highlight to the consumer the travel agent value proposition, travel agents:
 Protect me from the unexpected
 - 2. Makes it easy for me
 - 3. Inspire me with knowledge
- The 2018 AFTA National Travel Industry Awards officially commences with nominations opening on January 22. Committed to ensuring the integrity of the award process, and improving upon the fair and equitable selection of finalists, AFTA introduced a new two-step process to determining finalists.
- AFTA forms new strategic partnerships with AccorHotels and Virgin Australia

FEBRUARY

- AFTA's annual webinar program for 2018 commences. Since the launch of the program in 2014 AFTA has received over 4,000 webinar registrations and 98% of all participants surveyed indicate that the webinar program is excellent and content is relevant to their business needs. The annual calendar of webinars boasts a high calibre of guest presenters who cover a range of important and relevant topics – marketing, accounting, HR & legal matters, workplace health & safety and business best practice – to help members build lasting business success.
- Consumers are encouraged to stop dreaming and start planning at the 2018 AFTA Sunday Mail Holiday Expo in Adelaide.

MARCH

- Problem Solved! AFTA invites industry to join the AFTA Chargeback Scheme (ACS), an industry first, offering ATAS members free protection against debit and credit card chargebacks resulting from end supplier insolvency.
- The 2018 NTIA nominees are announced and voting commences.

ACS Payment providers are:

TravelPay
First Data.

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HERE'S WHY YOU SHOULD BE **ATAS ACCREDITED**

• BOOST YOUR CREDIBILITY AND TRUST WITH ATAS

The ATAS logo is a seal of approval from the national representative body for travel agents – AFTA. It tells savvy travellers that you are a trusted, professional and ethical business.

Only accredited travel agents receive the right to use the 'ATAS – travel accredited' branding. Featuring the logo in your outreach to clients gives travellers peace of mind and can strengthen your business' reputation and value proposition to the consumer.

• CONNECT WITH MORE TRAVELLERS

AFTA is committed to educating consumers about ATAS and the benefits of booking travel with an industry accredited travel agent. AFTA undertakes a range of marketing initiatives on behalf of ATAS accredited agents across television, radio, print and online.

All ATAS accredited businesses receive a listing on the consumer website – ATAS.com.au – by location and contact details. Every month there are over 2,500 search directory enquiries.

• ARM YOURSELF WITH RESOURCES

AFTA arms you with useful resources to help promote yourself as an accredited business. This includes email signature banners, consumer information flyers and support to download and use the ATAS logo across your website, in store and all marketing collateral.

ATAS also offers a range of cooperative initiatives to help you market your business to the consumer.

• FUTURE PROOF: BE A COMPLIANT AND ETHICAL BUSINESS

ATAS accreditation means you've met the highest of standards across a range of criteria including assessment of finances, minimum levels of training and operate in accordance with Australian Consumer Law. Additionally, ATAS ensures your business has the appropriate policies and procedures in place to respond to consumer questions and grievances, elevating you above the competition.

GROW YOUR BUSINESS

AFTA is committed to elevating industry standards and supporting your business growth. AFTA provides a business planning and advisory service available to AFTA members.

We conduct free monthly webinars carefully crafted to cover a range of important topics – marketing, accounting, HR & legal matters, workplace health & safety and business best practice – to help you build a lasting business.

If you're new to the travel industry, then accreditation is vital to operations as some suppliers won't do business with you unless you're ATAS accredited.

• PROTECT YOUR LIVELIHOOD AND YOUR FUTURE

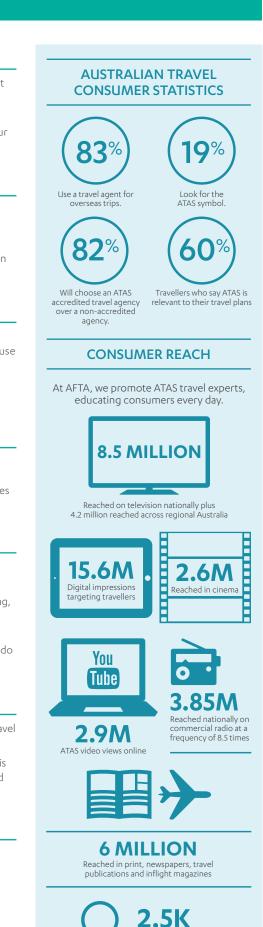
AFTA is the voice of the travel industry and deals with all major issues relating to the operation of travel agencies in Australia, at both State and Federal levels.

AFTA prides itself on being the industry watchdog where it ensures that the viewpoint of the agent is transmitted through media outlets and advocating through lobbying activities. Tools, resources and government submissions on all major issues are available on the AFTA website – afta.com.au.

• AFTA CHARGEBACK SCHEME (ACS)

AFTA Chargeback Scheme (ACS) is available to ATAS accredited travel agencies and provides protection against consumer debit and credit card chargebacks. ACS is a Mutual Beneficiary Fund owned by ATAS entities and at no cost to members. To find out more visit www.afta.com.au/ACS





ATAS directory searches every month

APRIL

- Submissions for the 4th year review of the ATAS Charter and Code closed on 30 April. Former ACCC CEO, Hank Spier, was engaged to review submissions from interested parties and to provide a report to the AFTA Board. The AFTA Board considered the report and the recommendations and agreed to adopt 20 of the 29 recommendations made. The review of the Charter is now complete and the relevant documents are available at www.afta.com.au.
- AFTA conducted consumer research to understand the consumer and use the insights to shape an effective marketing strategy for 2018 and 2019. The research was delivered by the independent global research agency FiftyFive5. The research confirmed ATAS' growing awareness amongst consumers and importance in influencing with whom consumers book travel. Some of the findings:
 - More than 60% of travellers say ATAS is relevant to their travel plans
 - Awareness of ATAS drives use of travel agents 82% will look for an accredited travel agent next time they book
 - 3 in 5 travellers will question a business' credibility if they can't see the ATAS logo displayed in their selling narrative.

New ATAS website:











MAY

- A new ATAS.com.au is launched. The revamped consumer website boasts improved navigation, seamless integration to the ATAS member database, an improved search directory and enhanced opportunities for ATAS accredited participants to be seen by the consumer.
- AFTA completes a submission to the Beyond Tourism 2020 Steering Committee – a process which reviews the Government's policy settings for the tourism and travel sectors. The submission continues AFTA's strong position on not lifting the PMC, reforming the Tourist Refund Scheme and ensuring a holistic approach to market development.
- The 2018 NTIA finalists are revealed congratulations!

JUNE

- The results of the Cinema campaign arrive the ATAS advertisement delivered across Australia in partnership with ATAS accredited travel agencies reached 1,197,131 million consumers!
- The AFTA Code Compliance Monitoring Committee (ACCMC) is renamed to the ATAS Compliant Appeal Committee (ACAC) following the April ATAS Charter and Code review.
- The 2018 People's Choice Travel Agency of the Year Campaign concludes and more than 10,500 consumers participated; that's a 50% growth since year 1 of the campaign (2016). A special thanks to Prize Partner APT and Consumer Media Partner International Traveller Media (International Traveller Magazine and Australian Traveller Magazine).

JULY

- AFTA and Major Sponsor Qantas host the industry's night of nights', the 2018 AFTA National Travel Industry Awards gala dinner

 21 July at the International Convention Centre Sydney. The 2018 gala dinner boasts the biggest lucky door prize pool in the history of the awards with sponsoring airlines giving away more than \$70,000 worth of prizes.
- AFTA submits a paper in response to the Commonwealth Treasury's introduction of an economy wide cash limit.

AUGUST

- AFTA launches an industry wide education campaign to help ATAS agents realise the full potential of the value of being accredited and look to increase awareness amongst travel consultants who need to talk about the scheme with their clients more often. AFTA's consumer research said 54% of consumers want ATAS to be spoken about more often, whereas only 4% of ATAS accredited agents are actively talking about ATAS with their clients.
- NTIA Winner of the Best Online Travel Agency, flybuys travel, proudly promotes its win to its database of 1.6 million consumers.
- AFTA releases two new reports titled ATAS Charter Activity and ATAS Code Activity. The factsheets report on AFTA's Membership by TTV, agency type, accredited locations, compliance activity et al.

ATAS education campaign:

82%

book with an ATAS accredited travel agent.

Learn More at afta.com.au/awareness



SEPTEMBER

- AFTA announces the launch of a brand new television commercial carefully crafted using the findings from the consumer research (April 2018).
- Jayson Westbury, AFTA Chief Executive, hosts a special member webinar on IATA's NewGen ISS, Resolution 812 to be implemented in Australia in November.

Behind the scenes of the new ATAS television commercial:



OCTOBER

- The new ATAS commercial airs, reaching 1.97million consumers in an effort to remind the Australian traveller that they can rely on travel agents to advise, book and manage their travel. The month-long campaign was shown across the Seven Network, TenPlay and YouTube and reached Australians in both metro and regional areas.
- AFTA hosts the inaugural Advisory Round Table and the Friends of Travel event at Parliament House.
- Grant Wilson, Executive Manager, CT Partners joins AFTA Board of Directors.

AFTA's new partners for the NTIA:

The Sydney Morning Herald THE AGE **Traveller**

NOVEMBER

- AFTA releases the results of its fourth annual membership survey for owners and managers. ATAS continues to be valued by travel agencies with more than 86% believing ATAS to be fundamental to their business.
- AFTA announces partnership with the Sydney Morning Herald and The Age *Traveller*. The media giant will support the promotion of the prestigious National Travel Industry Awards to the consumer.
- AFTA and CATO announce the launch of the inaugural CATO Awards. The Awards will be held as a dedicated segment within the AFTA NTIA to recognise and rewards front line travel consultants across four categories. The four categories are; Consultant of the Year – Group Touring, Consultant of the Year – Adventure, Consultant of the Year – Ski and Consultant of the Year – Independent Travel.

A new segment is announced for the NTIA in partnership with CATO:





Jayson Westbury, AFTA Chief Executive, speaking at the Travel Tech Summit.

DECEMBER

- Results are in! AFTA reaches 1.4 million consumers through its digital strategy.
- Jayson Westbury, AFTA Chief Executive, is keynotes speaker at the Travel Tech Summit.
- The AFTA Travel Pages receives the tick of approval and is sent off to the printer ready for distribution in January 2019. A big thank you to Business Publishing Group (*Travel Daily*) for the production of the 'year book' and all contributing ministers, associations, AFTA members and allied members.

OVERVIEW OF ATAS CODE OF CONDUCT ACTIVITY IN 2017



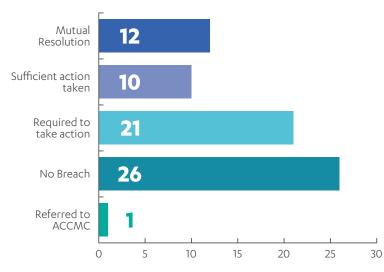
THE MAIN TOPIC OF COMPLAINTS

REFUNDS & CANCELLATIONS



INVESTIGATIONS COMPLETED BY THE ATAS COMPLIANCE MANAGER

The following outcomes were determined by the ATAS Compliance manager



THREE

Dismissed

CODE MONITORING ACTIVITIES

> In 2017, to demonstrate compliance with s 4.1 of the ATAS Code of Conduct, mandatory submission of Terms and Conditions and a Privacy policy was required of all ATAS Participants.



155 Complaints were advised to first engage in the Agents Internal Dispute Resolution process.



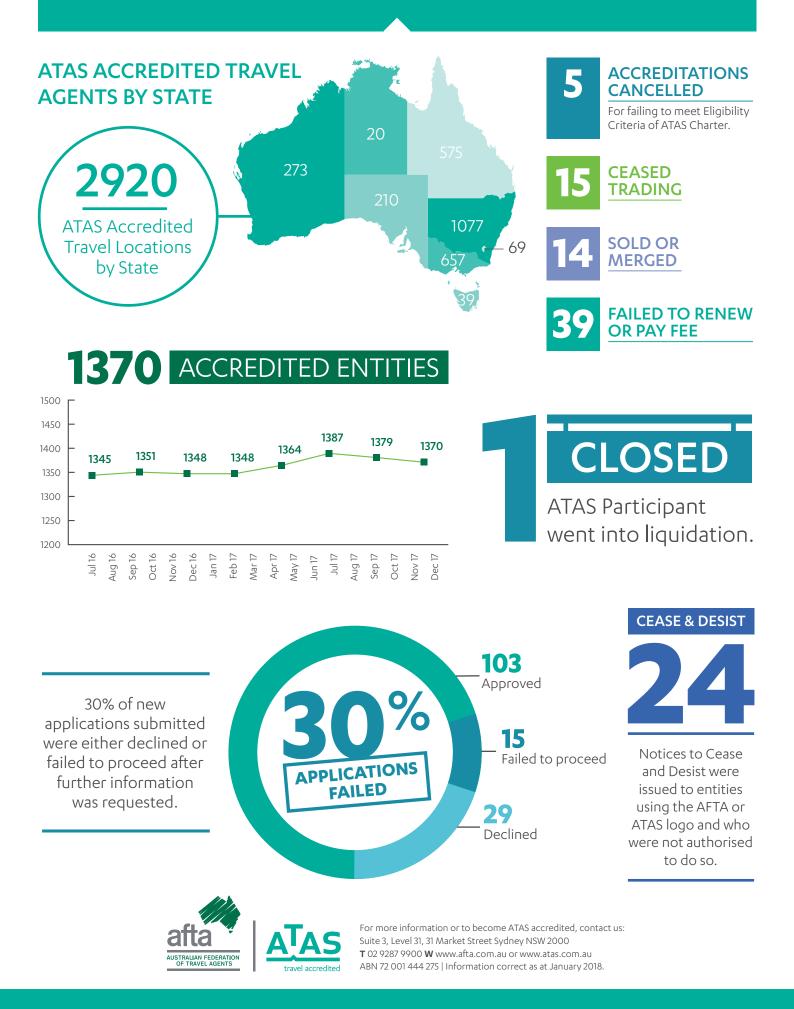
SIX Appeals to the ATAS Code Compliance Monitoring Committee (ACCMC) to review the ATAS Compliance Managers decision.





For more information or to become ATAS accredited, contact us: Suite 3, Level 31, 31 Market Street Sydney NSW 2000 **T** 02 9287 9900 **W** www.afta.com.au or www.atas.com.au ABN 72 001 444 275 | Information correct as at January 2018.

OVERVIEW OF ATAS CHARTER ACTIVITY IN 2017



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AN UPDATE ON ATAS

The AFTA Travel Accreditation Scheme (ATAS) is a national scheme which accredits Australian travel agents who meet a set of strict criteria and professional standards.



In 2018, ATAS hit a record mark celebrating 1,400 ATAS accredited entities following a steady stream of new applicants. This growth has been achieved whilst still ensuring the high standards of ATAS are continually applied and despite a number of cancellations made by AFTA throughout the year.

Reasons for cancellations have included; failure to demonstrate solvency, failure to meet the fit and proper person requirement, failing to renew or voluntary withdrawing. AFTA have also remained consistent in its decline rate of 30% of new ATAS applications due mainly to a continued number of start-up applications lacking experience, training and funds. Upholding the standards and the value of ATAS accreditation to industry and consumers is paramount to the work we do at AFTA.

RENEWALS

We have seen yet again a pleasing improvement in the timely submission

of annual renewals. Thank you to all our valued members for you continued support and commitment to the scheme and to the travel industry.

CHARTER REVIEW

AFTA appointed ex CEO of the ACCC, Hank Spier, to conduct a 4th year review of the ATAS Charter and the ATAS Code of Conduct. Of the recommendations made by Mr Spier, the AFTA board accepted and implemented 20 of the 29 recommendations, accepted a further 2 in part, and rejected seven of the recommendations.

The review saw significant removal of duplication from the Charter and a reduction from 77 pages down to 44 pages in total, making it easier to navigate and more user friendly for both agents and consumers.

One of the main recommendations implemented was an overhaul of the Attachment D Solvency Definitions to the ATAS Charter which now better reflects the financial assessments conducted by AFTA on members. Another significant change saw the workforce development requirement increase from 30% to 50% of all consumer-facing staff to hold a Certificate III – Travel, or equivalent. A webinar recording and a top 10 summary of the changes is available on the AFTA website.

COMPLAINTS

As ATAS awareness grows, the level of complaints has continued to grow. We are very pleased with how agents are embedding the ATAS complaint process into their business and documentation. Last May, ATAS launched its new consumer facing website which included a new four step online complaint submission form, further demonstrating the commitment of ATAS to customer service and complaint handling processes. Over 600 complaints were received and over 100 investigation determinations were issued by the ATAS Compliance Manager. In 2018, the focus was on achieving mutual resolutions or win/win scenarios for agents and complainants and avoiding any further escalation to courts or tribunals. Over \$120,000 was returned to consumers via the ATAS process last year but more importantly, agents agreed to and demonstrated numerous changes to improve IT systems, terms and conditions, documentation or processes.

All ATAS accredited agents have agreed

66In 2018, the focus was on achieving mutual resolutions or win/win scenarios for agents and complainants and avoiding any further escalation to courts or tribunals?? to be bound by the voluntary ATAS Code of Conduct and we aim to further educate and embed the Code into the conversation between agents and consumers as this service demonstrates the commitment and professionalism that ATAS accreditation represents.

ACAC

One of the recommendations of the Charter review was a name change of the complaint oversight committee from ATAS Code Compliance Monitoring Committee (ACCMC) to ATAS Complaint Appeal Committee (ACAC). In 2018, AFTA welcomed three new representatives to the committee: Flight Centre Senior Executive Marg Mulholland, and consumer representatives: Liz Newby and Jill Toohey. Chairman Graham McDonald joined in 2017.

The ACAC received 10 appeals from complainants against the decision of the ATAS Compliance Manager and dismissed five of those appeals. In the other five appeals, an alternate decision was made. The AFTA website summarises the outcomes of appeals and we share these stories in the AFTA@work newsletter.

AFTA CHARGEBACK SCHEME (ACS)

ACS has continued to grow its member base and we look forward to welcoming new ATAS members into this world first scheme to protect travel agents from Forward Delivery Risk. A number of agents are reaping the benefit of having joined already, with a number of claims paid out following the Si Holidays closure. As one agent stated "you have to have rocks in your head" not to join – and we agree! ACS is only available to ATAS accredited agents and was created to protect you – our members from debit and credit card chargebacks as the result of third party insolvency.

In 2019, ATAS is looking to continue to build on its value proposition to members by further strengthening the ATAS brand and resources to members. The AFTA team are here to help and answer any of your questions and offer support in any way we can.



INTRODUCING THE AFTA CHARGEBACK SCHEME (ACS)

Protecting your business against chargeback from supplier insolvency.

INNOVATIVE PROTECTION - YOUR SCHEME, YOUR FUTURE.

THE WHAT

The AFTA chargeback Scheme is a nonprofit, member owned Mutual Fund that protects travel agents from credit and debit card chargebacks resulting from end supplier insolvency. ACS is free to all ATAS accredited travel agencies.

THE WHY

ACS provides your business with protection against a client chargeback resulting from a supplier collapse (insolvency) worldwide. Historically, this has been a big problem for the travel industry. Think of collapses like Ansett and the recent All Leisure Group where travel agencies were forced to close due to client chargebacks. Being a part of ACS ensures that you are protected from exposure to this very real risk.

THE HOW

As an ACS scheme participant, you simply claim against the scheme in the event a chargeback is invoked against your business.

There are no joining fees and on-going costs for you to participate in the Scheme. Contributions are made at the time of charging a client's credit or debit card at a rate of .25% of the total transaction value. This is able to be included in the merchant fees that you pass on to your clients. The contribution is taken seamlessly in the background – there's no extra administration for you!

THE WHO

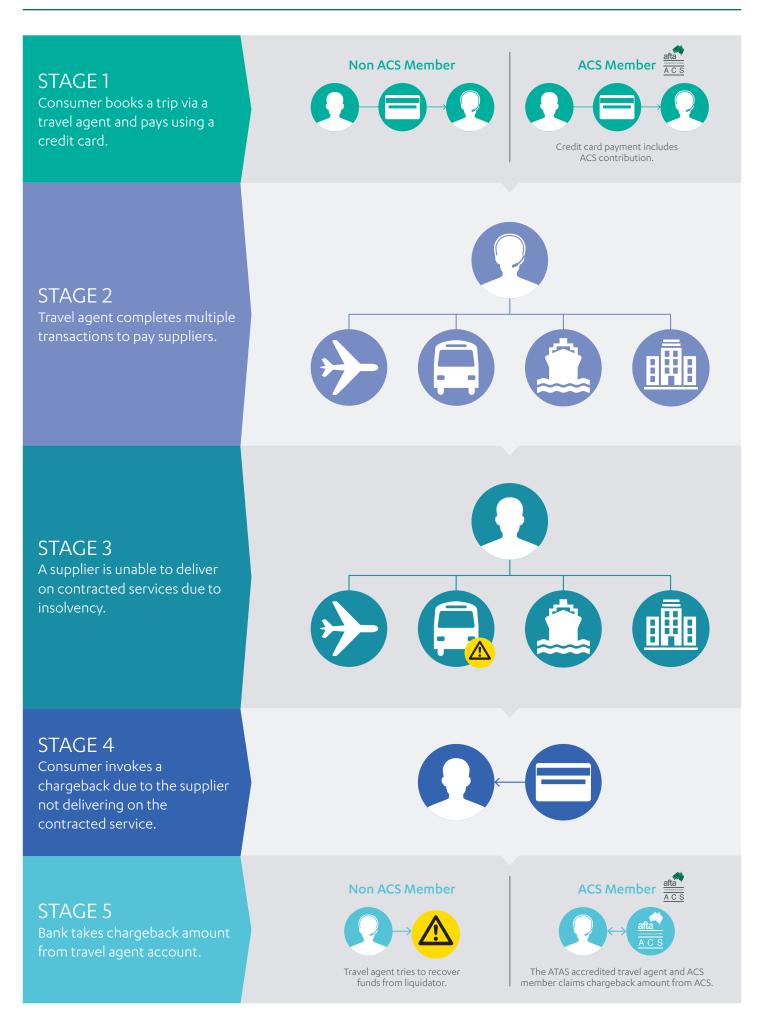
ACS works with several payment partners who are not only are able to collect and process the ACS contribution but who also offer innovative and competitive merchant services tailored to the travel industry. In order to participate in the Scheme, you will need to process payments through one of these companies.

DID YOU KNOW

- ACS protection is ONLY available to ATAS accredited agents, a very real, tangible benefit of AFTA membership.
- ACS covers all suppliers including airlines, hotels, tour companies, wholesalers and cruise lines, regardless of where they are located.
- The ACS contribution is 100% RBA compliant and can be bundled into your merchant fees with confidence.
- Over 25% of all AFTA members are already enjoying the security of protection against unforeseen chargebacks.

Can you really afford not to get onboard?

HOW DOES ACS WORK?



ACS PAYMENT PARTNERS

The AFTA Chargeback Scheme (ACS) Payment Partners can provide you with new and innovative payment solutions for your business while collecting and remitting the ACS contribution for you.

	PAYMENT GATEWAY	VIRTUAL TERMINAL	CLIENT PAYMENT PORTAL	PHYSICAL MERCHANT TERMINAL
	Use your current merchant facility (most likely provided by your bank) and agreements to process payments online. The consultant user experience is similar to a virtual terminal	A virtual terminal allows consultants to enter a client's credit or debit card directly into a secure payment webpage. This allows consultants to process transactions in person and over the phone without the need of a shared terminal.	Allows a client to pay for travel via their PC or mobile without the need of a consultant to be present at the time of the transaction. This portal can be accessed through a link provided by the consultant or a dedicated online payment page on your website.	A traditional way of processing payments where you have merchant terminal in your office.
TravelPay ^{™*}	×	~	~	~
First Data.	~	~	~	~
Mint [*]	~	~	~	~
-444 ^m	×	~	~	×
SecurePay #	~	~	~	×
wirecard	×	~	~	×

 * Indicates that the payment partner can provide ACS protection on American Express transactions.

 $^{\#}$ Indicates that the payment partner can provide ACS protection with your agency specific American Express agreement.

66 WHAT OUR MEMBERS SAY **99**





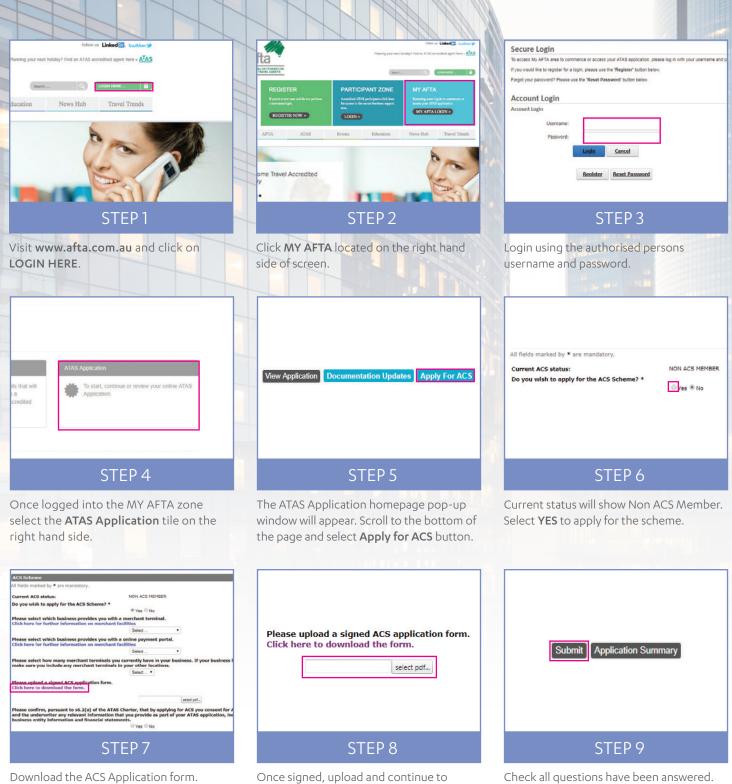
The collapse of Si Travel in March 2018 caused a disruption to one of our clients and thanks to ACS, we were able to give them advice on how they could recover their money and give them the peace of mind they needed to enjoy their holiday.

The client lodged a chargeback with their bank and we lodged our claim with ACS which was approved and ACS paid back this loss within 5 days.

Being ACS protected allowed us to deliver a great service to our client as we always strive to do.

Julie Imad | Jewells Travel & Tourism

ACS APPLICATION INSTRUCTIONS



complete remaining questions.

When finalised click **Submit**.

Once you submit your application a member of the AFTA compliance team will be in touch to answer your questions and introduce you to the ACS payment partners that are best suited to your requirements.







Suite 3, Level 31, 31 Market Street Sydney NSW 2000 **T** 02 9287 9900 **W** www.afta.com.au or www.atas.com.au ABN 72 001 444 275

DOMESTIC TOURISM OVERVIEW

Many Australians are discovering the gems that are in our own backyard. Read how tourism is growing around the country.

FROM THE FEDERAL MINISTER

Simon Birmingham, Minister for Trade, Tourism and Investment

2018 WAS AN ABSOLUTE BUMPER YEAR FOR THE INDUSTRY WITH AUSTRALIA ONCE AGAIN SEEING RECORD NUMBERS OF INTERNATIONAL DEPARTURES AND AN ESTIMATED 9.4 MILLION AUSTRALIANS CHOOSING TO HOLIDAY OVERSEAS.

Notably, the majority of Australians who travel overseas still utilise the services of a travel agent or an online Australian platform to book their overseas holiday or business trip.

This is a testament to all of you within the sector for your enduring commitment to the work you do, your expertise, professionalism and high level of service.

It also presents many new and exciting opportunities for further growth within the sector as a booming travel sector that is globally competitive helps contribute to a stronger economy and creates more jobs with tourism overall currently employing around one in 13 Australians.

We should all be proud of the long tail of capability development and high degree of innovation we are currently experiencing within the sector from our airlines, bricks and mortar travel agencies, online travel platforms, hotels, training providers and tour companies.

Last month, I co-chaired my first Tourism Access Working Group where I sat down with a broad range of industry representatives from Australia's airports, airlines and tourism industry associations to discuss issues impacting the international competitiveness of the tourism industry.

I was able to update the group on the Liberal-National Government's 'Tourism 2020' strategy, which is our long-term tourism strategy to ensure the industry continues to develop in a sustainable



way, and to ensure we have the aviation access, accommodation, infrastructure and workforce needed to support strong growth in both our outbound and inbound sectors.

In particular we have made strong progress on the aviation front, with around 60 different airlines providing over 2,000 direct services to and from Australia each week, while many more offer services via codeshare arrangements. Whilst this is great news for inbound tourism it is also great news for Australians looking to holiday overseas, giving them a high degree of flexibility in selecting airlines, routes and schedules. It also provides enormous opportunities for travel agents giving you more variety and a greater ability to promote more destinations throughout the world.

This year Australia will host the world's largest aviation forum with Adelaide

set to welcome the 25th annual World Aviation Routes conference. This global trade event will see around 3,000 aviation professionals from 300 airlines, 700 airports and 130 tourism authorities gather to discuss and develop new aviation routes and strategies. By hosting this conference, Australia will be front of mind when the biggest aviation companies have discussions about new air routes or expanding capacity on existing routes.

The Liberal-National Government continues to support Australia's \$136 billion tourism industry by continuing our record funding to Tourism Australia, advocating for more aviation capacity, improving our tourism investment environment and promoting greater twoway people-to-people flows with our key trading partners through our network of free trade agreements.

FROM THE SHADOW MINISTER

Anthony Albanese, Shadow Minister for Tourism

AUSTRALIANS CONTINUE TO TRAVEL BOTH NATIONALLY AND ABROAD IN RECORD-BREAKING NUMBERS.

Indeed, for the year ending March 2018, nearly nine and a half million Australians travelled overseas for work or leisure – an increase of five per cent on the year before.

Closer to home, for the year ending June 2018, Australians took more than 100 million overnight trips and 200 million domestic day trips.

Even with the rise of online booking websites, the fact is travel agents continue to play a critical role in supporting Australians in their travels.

AFTA research indicates that more than 70 per cent of all Australian departures book at least one part of their trip through an Australian travel agent.

Many of these travel agencies are SMEs in towns and suburbs, owned and operated by locals who are trusted by their community.

Supporting local businesses, particularly in a time of significant growth, is critical.

Cheaper flights and an increase in new, direct routes, such as QF9 Perth– London and Darwin–Shenzhen, are enabling more and more Australians to see the world.

And this goes both ways, with the number of international visitors to Australia also on the rise.

Consequently, the role of the federal government when it comes to supporting the tourism industry has never been more important.

Labor is committed to restoring tourism to the heart of Australia's economic narrative, recognising its importance as a super-growth sector for local jobs and the economy.

Tourism contributes \$110 billion to



Australia's national GDP and employs almost one million people.

Labor will work with the industry to develop skills, education and training opportunities across the tourism sector.

The fact is that tourism provides a diverse range of great career options – in small business, hospitality, events organising and a number of other areas.

Tourism can be a job to make ends meet while at university or for those on a gap year.

But it can also be a career for life, providing people with opportunities to establish themselves and progress in their chosen field.

That's why investment in skills and training is so important – it recognises this potential and attracts a broader range of people to work in the tourism sector.

Labor will also support tourism

research and data collection to ensure that investors, government and business are well placed to continue to grow the sector.

Our record from when we were last in government is one that I am proud of.

We invested in tourism, including the infrastructure and skills that underpin this sector's success and enable longterm growth.

And we intend to build on this, should we be elected at the next election.

We are also committed to consulting with you on key issues impacting tourism in the lead up to the 2019 Federal Election and, just as we did last time, we will release our tourism policy prior to the election following this consultation.

I look forward to continuing to work with you to ensure tourism continues to play such a pivotal role in economy.

FROM TTF

Margy Osmond, Chief Executive Officer, Tourism & Transport Forum

AUSTRALIA SITS AT THE TOP OF THE PACK WHEN IT COMES TO GLOBAL MUST-VISIT DESTINATIONS, BUT IS AN ISLAND CONTINENT, AND AS SUCH RELIES ON GLOBAL AVIATION ROUTES TO BRING THESE VISITORS IN.

It is this same global aviation network that also allows Australians to travel the world, whether as tourists, for business or for visiting friends and relatives in nearby and far flung corners of the world.

The latest numbers show that 2018 has been a smashing year for the tourism sector, international and domestic tourists spending a combined \$110 billion over the last financial year – up from \$107 billion – and with no signs of slowing down.

Domestic overnight travel had strong growth over the year, up 7 per cent on previous figures to reach over 100 million overnight trips. Strong growth in spending and overnight stays sends a clear message that Australians love exploring the richness and diversity of their own backyard which means more economic activity on home soil rather than overseas.

The lower Aussie dollar is encouraging more international visitors to our magnificent country with strong growth in key Asian source markets. While already well ahead of the international pack in terms of spend, in terms of volume, this year China overtook New Zealand as Australia's largest market with a record 1.3 million visitors in the last financial year.

Our major aviation gateway airports in Sydney, Melbourne, Brisbane and Perth collectively handle around 8 million international tourist trips each year on a range of leading airlines like Qantas, Virgin and other international carriers including Singapore Airlines and Cathay Pacific, with recent growth particularly from Asian and Chinese carriers.

For example, we have seen good recent signs for South Australia with



Malaysia Airlines, Cathay Pacific and China Southern all putting on additional Adelaide services and Singapore Airlines also upgrading its Adelaide aircraft to the next-generation Airbus.

To keep that momentum going, Adelaide was announced as the host for next year's World Routes Conference. The world's largest aviation conference will see around 3,000 aviation professionals from 300 airlines, 700 airports and 130 tourism authorities gather to discuss and develop new aviation routes and strategies.

Recently New South Wales struck its first Memorandum of Understanding (MoU) with one of China's largest airlines to boost tourism to Sydney and regional NSW. Minister for Tourism and Major Events Adam Marshall said China Eastern Airlines is responsible for a lucrative market share of inbound flights to Sydney and the new deal is set to grow the market even further.

And on the other side of our country negotiations are underway between the

Western Australian Government and Indian Government to establish direct non-stop flights between India and Perth. Minister for Tourism Pail Papila cited the fact that India is already a fast growing market for Western Australia with the number of visitors increasing by 38 per cent from the year ending December 2015 to the same period in 2017.

All of this is great news for the travel agent sector, with many tourists choosing to draw on the expertise and networks of international travel professionals when they venture overseas.

In 2019, the travel and tourism industry will continue to transform, adopt new technology and embrace new innovation and new ways of thinking to improve how it does business, which is the business of providing a quality domestic and international visitor experience. In fact, that is the very theme of our major Tourism and Transport Forum Industry and Policy conference in 2019 'Outlook', on which I will have more to share early next year.

DOMESTIC RESURGENCE MAKES TOURISM A LEADER

From the resort revival among the tropical islands to the artisan food movement sweeping the rural south, Australia's domestic tourism industry is experiencing a renaissance.

In line with a booming inbound sector and record levels of international travel, Australians travelling domestically have helped make the tourism industry one of the brightest hot spots of the national economy, eclipsing the growth shown in other sectors.

The most recent National Visitor Survey results issued by Tourism Research Australia (TRA) showed domestic overnight travel surged 7% during 2017/18 to just over 100 million trips. The growth in overnight trips was also reflected through strong gains in visitor spending which increased by 8% to a record \$67.5 billion – about \$5 billion more than the previous year.

Showing the strongest growth was interstate travel, which outpaced local tourism to post a 9% increase. Australians made a record 33 million overnight interstate trips during 2017/18, while spending reached a record \$31.3 billion. Interstate travel remains more lucrative than intrastate travel, with the average spend per interstate trip at \$947 per person, more than \$400 more than that of intrastate trips.

Right: Queensland leads Australia in visitor spending, with savvy travellers preferencing outdoor activities such as a hike on Hinchinbrook Island, QLD.



On top of that, Australians took more than 200 million domestic day trips during the year, an increase of 7%, which resulted in further spending of \$21.4 billion, or 9% more than in 2016/17.

TRA says domestic spending now accounts for almost two-thirds of all overnight tourism spend - including that of international visitors - and almost 70% of total tourism spending.

"In general, domestic visitors demonstrated savvy travel behaviour during the year with growth in unpaid or cheaper accommodation, and more nature-based and outdoor activities in preference to paid activities," TRA said.

Combined with the healthy inbound sector, the tourism boom has brought windfalls for major operators and helped generate a renewed growth in hotel investment, with major projects underway or soon to begin across the major capitals including Sydney, Melbourne and Brisbane. Domestic travellers increased their spending on accommodation by 8% to \$17.7 billion in 2017/18.

It has also proved a major bonus for Australia's domestic carriers, contributing to the record profits revealed by Qantas and the return to profitability announced by Virgin Australia. TRA says rising levels of interstate travel brought a 9% increase in domestic airfare spending, which totalled \$10.2 billion for overnight visitors last financial year.

Across the states, New South Wales

has led the way in terms of domestic tourism growth, with visitor numbers up 9% to 32.9 million in 2017/18. Spending increased at an even faster pace, up 15% to \$19.8 billion, suggesting success for the strategies of Destination NSW which has placed a heavy emphasis on highprofile events like the annual Vivid Festival in Sydney, as well as initiatives to disperse travellers to regions outside the capital.

Western Australia has also showed strong growth, with domestic visitors up 8% to 10.2 million, although spending slipped 2% to \$7 billion. The state has placed a strong focus on boosting tourism from interstate to help offset the impact of the end of the mining boom, mounting high-profile marketing campaigns in Sydney and Melbourne and appointing a new trade representative to support industry partners in the eastern states.

Victoria and Queensland continue their tussle for the title of Australia's second biggest domestic destination, with Victoria leading on tourist numbers and Queensland ahead in visitor spend.

In Queensland, domestic tourism has bounced back after several natural disasters including Cyclone Debbie, despite a heavy impact on the Whitsundays. The total number of domestic visitors to Queensland grew 5% in 2017/18 to reach 22.5 million, while spending surged 10% to hit \$17 billion.

The growth has helped boost confidence in the sunshine state, where investments underway include a major expansion of the Star Gold Coast, the construction of the new Queens Wharf Right: Victoria leads Australia when it comes to visitor numbers, with a strategy highlighting areas outside of the city of Melbourne such as De Bortoli Yarra Valley Estate.



integrated resort project in Brisbane, plus a series of resort redevelopments on islands such as Daydream and Lindeman.

Melbourne continues to reap the benefits of its creative marketing campaigns, while at the same time Tourism Victoria has been highlighting areas outside the city where food, wine and natural landmarks have been brought to the fore. Victoria's domestic visitor numbers were up 6% to 24.7 million last financial year, with spending up 8% to \$14 billion.

Tasmania and South Australia have also put a heavy focus on their artisan foods, fine wines and natural environment, both becoming recent success stories in the domestic tourism front. Tasmania's domestic visitor numbers were up 4% to 2.8 million, while South Australia lifted its numbers by 5% to 6.5 million.

Although its domestic visitor numbers have slipped 11%, the Northern Territory has gained a huge boost in profile from initiatives such as the Field of Light installation at Uluru, while the national capital has successfully leveraged a succession of events and major exhibitions to lift numbers by 2% in the ACT.

The future looks bright for years to come, too. TRA forecasts suggests domestic visitor nights are set to grow 25% by 2027, reaching more than 421 million nationally.





Left: Uluru's Field of Light installation has continued to boost the Northern Territory's profile.

Right: Tasmania and South Australia have both made the most of their artisan foods, such as Bruny Island lobster, to boost tourism.

All images courtesy of Tourism Australia

DESTINATION NSW

Sandra Chipchase, Chief Executive Officer, Destination NSW

2018 HIGHLIGHTS

Destination NSW achieved another set of outstanding results for international visitation in 2018. Maintaining its national dominance, NSW led the country for visitors, nights and expenditure. In the year ended June 2018, NSW welcomed more than 4.3 million international visitors who stayed 94.4 million nights and spent \$10.5 billion.

Vivid Sydney, the world's largest festival of light, music and ideas, set a new record with 185,887 travel packages sold in 2018, up a whopping 37 per cent on last year's festival. Among international visitors, the festival continued to be most favoured by Chinese travellers, with more than 25,500 (Mainland and Hong Kong) packages sold in 2018. Total visitor numbers for Vivid Sydney 2018 reached 2.25 million, injecting more than \$172.9 million for the NSW visitor economy.

Destination NSW remained at the forefront of innovation and strategic thinking by launching an interactive mapping tool as part of a new \$2 million NSW Road Trips campaign. The campaign featured media partnerships with digital publishers – We Are Explorers and The Urban List, digital video distribution and social media. For the first time, Destination NSW partnered with global music service, Spotify, to provide listeners with personalised playlists matched to their own road trip itinerary.

In August 2018, the NSW Government announced its first-ever regional tourism target of \$20 billion in visitor expenditure in rural and regional NSW by 2025, rising to \$25 billion by 2030. The target is supported by a range of initiatives, such as increased funding for marketing campaigns, more rural and regional events and improved tourism infrastructure, to encourage greater visitation to rural and regional NSW.

In November 2018, the NSW Government launched the State's first Food & Wine Strategy & Action Plan 2018-2022, aimed at attracting more food



and wine visitors to Sydney and regional NSW. The four-year strategy & action plan includes five core strategies and 27 actions, designed to ensure that our state is recognised amongst the world's leading food and wine destinations, offering Australia's best and most diverse food and wine tourism experiences.

Just a few of the event highlights in 2018 include the 10th anniversary of Vivid Sydney, the Australian premiere of the new 40th anniversary production of Tim Rice and Andrew Lloyd Webber's iconic musical *Evita*, the world premiere of *Muriel's Wedding The Musical*, the first-ever UK Super League match between the Wigan Warriors and Hull FC in Wollongong, the 20th anniversary of the Deni Ute Muster, L'Etape Australia in the Snowy Mountains and the Parkes Elvis Festival.

OUTLOOK FOR 2019

Next year presents many new and exciting prospects for Destination NSW including a bumper calendar of events such as the Australian premiere of Charlie and the Chocolate Factory, the blockbuster productions of Chicago and Saturday Night Fever, Handa Opera on Sydney Harbour – West Side Story, three NRL Premiership Games in Mudgee, Bathurst and Wagga Wagga, and the Australian exclusive of The Royal Edinburgh Military Tattoo in Western Sydney, with many more soon to be announced.

In 2019, Destination NSW will be focussing its efforts on building visitor growth and delivering actions identified in the Visitor Economy Industry Action Plan 2030. The recent reforms to tourism and the NSW Government's continued commitment to our industry mean that our state is well placed to continue to set the benchmark for innovation and recordbreaking results. Destination NSW will continue to work with industry partners and key stakeholders to ensure Sydney and regional NSW continue to be amongst one of the world's most successful tourism and events destinations.



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Start exploring today. Call 1300 556 100 or visit aatkings.com



SATC

Rodney Harrex, Chief Executive, South Australian Tourism Commission

2018 HAS BEEN AN EXCITING YEAR FOR SOUTH AUSTRALIA'S TOURISM INDUSTRY. SOUTH AUSTRALIA'S VISITOR ECONOMY HAS REACHED AN ALL-TIME HIGH OF \$6.7 BILLION WITH THE STATE WELCOMING 7 MILLION INTERNATIONAL AND DOMESTIC VISITORS TO THE YEAR END JUNE 2018.

China continues to be the strongest performing market in terms of expenditure, exceeding targets early, and rising 18 per cent to a record high \$416 million. These results show a positive impact from our partnership with China Tourism Ambassador, Huang Xiaoming.

Food and drink are amongst our state's best assets and we're constantly seeking ways to stimulate the appetite for South Australia. Our investment in MasterChef SA Week served as a strong showcase of South Australian produce, talent and innovation. The show achieved an average nightly audience of 1.16 million viewers with a total TV audience reach of 5.2 million equating to 23% of the Australian population.

In September we launched our Rewards Wonder campaign featuring 120 hours of continual footage of South Australia. This showcased the many wonders of our state and an array of high-profile South Australians – from Olympic athletes and AFL stars to award-winning chefs, musicians and winemakers. We have already seen some great results including more than 3 million organic and paid impressions through Facebook and 43,187 total leads to SA tourism operators in October, a 96% increase vs. October 2017.

Direct air access continues to be a focus and as of June 2018, international flights to Adelaide were at 46 per week. This equates to around 12,000 international seats to Adelaide each week. In October China Southern Airlines increased flights between Guangzhou and Adelaide to



6 Food and drink are amongst our State's best assets and we're constantly seeking ways to stimulate the appetite for South Australia **?**

five per week and Singapore Airlines is preparing to launch its newest Airbus A350-900, in Adelaide with a range of features to enhance travel experiences. These new flights are growing links to South Australia around the globe, making it easier for visitors to travel to our state.

Events continue to be an important

contributor to our visitor economy and this year experienced some fantastic results. The Santos Tour Down Under attracted a record 46,000 visitors from interstate and overseas generating an economic impact of \$63.7 million while Tasting Australia saw nearly 5,000 interstate and almost 3,000 international guests experiencing our state's amazing food and wine scene.

Looking ahead in 2019 we have our packed events and festivals season coming up culminating in 'Mad March' with world-class events such as the Superloop Adelaide 500, Adelaide Fringe, Adelaide Festival of Arts and WOMADelaide. With so much on offer from premium food, wine and beverages, amazing events and festivals to unique nature and wildlife and pristine beaches there is something for everyone to enjoy in South Australia.

TOURISM & EVENTS QUEENSLAND

Leanne Coddington, Chief Executive Officer, Tourism and Events Queensland

IN 2018, QUEENSLAND WAS SHOWCASED TO THE WORLD LIKE NEVER BEFORE.

The 2018 Gold Coast Commonwealth Games lived up to its billing as the biggest event in Australia this decade, delivering an unprecedented opportunity to generate significant tourism benefits for many years to come. The Games also provided the perfect platform for Tourism and Events Queensland to bring back the quintessential and world-renowned Queensland tagline 'beautiful one day, perfect the next'. The campaign has been a resounding success, inviting travellers to 'Find their perfect next...', reaching more than 12 million people - and growing across the world.

In October, Queensland welcomed the Duke and Duchess of Sussex to Fraser Island and once again found itself front and centre on the global stage. The exposure for Queensland was priceless and coincided with a campaign in the UK inviting Brits to experience Fraser Island's crystal blue waters, white sands and heritage-listed rainforest, perfectly timed as they headed into winter.

Queensland also launched a campaign to capitalise on the increased exposure from Tourism Australia's highly-anticipated Dundee Campaign during the Super Bowl earlier this year. This highly creative campaign broke the mould on so many levels, generating one of the highest advert recalls of all time and reaching more than 100 million viewers, with Queensland locations including Lawn Hill Gorge, Mission Beach and Opal Reef featured prominently. TEQ will continue to pursue opportunities to leverage awareness and drive conversion as part of the second phase of this campaign in 2019.

We know our tourism experiences are among the world's best, however we



operate in a highly competitive market and capturing consumers' attention is more difficult than ever before. To stay top of mind and retain our competitive edge we must continue to push the boundaries when it comes to delivering exceptional visitor experiences in Queensland.

Hosting world-class events is a key part of this strategy and we've worked hard to develop an events calendar now worth \$780 million. Our It's Live! In Queensland events calendar offers visitors a breadth of different experiences in the best locations, giving them a taste of the Queensland lifestyle and cementing our reputation as a world-class events destination. Events such as the Toowoomba Carnival of Flowers and the Birdsville Races have become synonymous with Queensland culture. Similarly, Queensland has become a must-do destination for endurance sports such as the Noosa Triathlon Multi Sport Festival offering athletes the

opportunity to compete against stunning backdrops. In 2019, Queensland will be hosting the world's leading and most exclusive sports convention, SportAccord, on the Gold Coast which will further profile Queensland to the world.

We know nature-based experiences rank among top travel motivators for international visitors. Our natural assets, including Queensland's five World Heritage areas, are some of the most unique and diverse in the world, from our state's great natural wonder, the Great Barrier Reef, to the world's oldest living rainforest. Coupled with our friendly hospitality and our rich Aboriginal and Torres Strait Islander culture, this offers the perfect recipe to capture the hearts and minds of visitors and we look forward to further developing opportunities to offer travellers unforgettable naturebased experiences in the best address on earth.

TOURISM NT

Simonne Shepherd, Chief Executive Officer, NT Department of Tourism and Culture

IN 2018 THE NORTHERN TERRITORY GOVERNMENT INITIATED AN INVESTMENT OF \$103 MILLION DOLLARS TO TURBOCHARGE TOURISM IN THE TERRITORY. THE TURBOCHARGING TOURISM INVESTMENT IS AIMED AT ATTRACTING MORE VISITORS, CREATING MORE JOBS AND BOOSTING THE TERRITORY ECONOMY TOWARDS 2019 AND BEYOND.

The stimulus package is enabling Tourism NT to inject more money to market the Territory both domestically and internationally.

Tourism NT is investing in upgrades to improve the visitor offerings – including in our amazing national parks and our expanding calendar of events, festivals and programs.

In 2019 the NT will showcase a series of unique and spectacular events.

Darwin will host another action-packed Supercars event in June 2019, attracting thousands of visitors to the Top End, providing plenty of entertainment for locals and visitors. With more than 40,000 spectators, including 4,000 interstate fans, this is a major event on the calendar.

The NT will also host two AFL games in 2019. The Melbourne Demons will play home matches in Darwin and Alice Springs. The Demons will take on reigning premiers West Coast Eagles in Alice Springs and battle it out with the Adelaide Crows in Darwin.

In the Red Centre the fourth Parrtjima - A Festival in Light will exhibit awe inspiring Aboriginal art and culture. During April 2019 Parrtjima will proudly showcase the oldest continuous culture on earth through the newest technology. Building on the success of the 2018 event, Parrtjima activation will be displayed at the Alice Springs Desert Park and CBD precinct.

Tourism NT has been working hard to



66 Tourism NT is investing in upgrades to improve the visitor offerings - including our amazing National Parks and our expanding calendar of events....??

improve access to the NT with significant investment towards aviation access. Flights to the NT have been expanded with the establishment of:

- Direct China flights from Shenzhen into Darwin;
- Virgin Australia's direct flights from Brisbane to Alice Springs; and,
- Jetstar's Brisbane to Uluru direct service.

These additional aviation routes

are a result of increased visitation demand and are hugely exciting for the tourism industry.

Tourism NT also understands the quality of our experiences and customer service is paramount to the level of enjoyment visitors encounter in the Northern Territory.

Through the Turbocharging Tourism stimulus Tourism NT has implemented a new \$3 million Visitor Experience Enhancement Program. This program is delivering grant funding to assist tourism operators and industry towards improving visitor experiences.

In addition to Turbocharging Tourism, the NT Government is investing in several major projects to drive tourism visitation, including a new National Aboriginal Art Gallery in Alice Springs.

With so much happening in the NT, Tourism NT is gearing up for an exciting and productive year for the tourism industry.

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TOURISM TASMANIA

John Fitzgerald, Chief Executive Officer, Tourism Tasmania

TASMANIA IS CONTINUING TO WELCOME RECORD NUMBERS OF VISITORS TO OUR ISLAND STATE AND OUR APPEAL AS AN ENRICHING AND MEMORABLE HOLIDAY DESTINATION IS RESONATING BOTH DOMESTICALLY AND INTERNATIONALLY.

The Tourism Tasmania team has been working hard this year to connect with travellers who understand what we have to offer, are looking for deeper connections and want to share our way of life.

In a world where many people's lives are spent in traffic, big cities and working long hours, Tasmania offers a holiday destination that is soulenriching, allowing our visitors to connect to places and activities that are real and familiar and offer opportunities to reconnect with themselves and their loved ones.

Our stunning landscapes, wildlife and nature experiences are complemented by fantastic food and wine and a wealth of award winning tourism businesses that offer a perfect counterpoint to modern life.

Our marketing campaigns are focused on providing authentic and unique stories of Tasmania and its people and we have seen growth in visitor numbers around our regions with record visitor spending and increased lengths of stay by our holiday makers.

In the past year, access to the state has also strengthened with a new direct service from Perth and more seats on flights from Sydney, Melbourne, Brisbane, Adelaide and the Gold Coast. The *Spirits of Tasmania* have also increased sailings across Bass Strait to meet the growing demand for drive holidays.

As an island state, our touring program offers travellers freedom, flexibility, a dose of nostalgia and the opportunity for a digital detox. Tasmania's Great



66As an island state, our touring program offers travellers freedom, flexibility, a dose of nostalgia and the opportunity for a digital detox**99**

Eastern Drive explores Tassie's east coast and would have to be one of Australia's greatest road trips. To complement this journey, the Western Wilds has been recently launched and is a major initiative of all levels of government and the tourism industry.

The Western Wilds will enable visitors to embark on a journey through the powerful wilderness stories of western Tasmania, compelling travellers to explore the area at a slower pace and engage more deeply in the place and its people.

Tourism infrastructure investment is also continuing to contribute to more tourism experiences and more accommodation around the state. The fantastic Peppers Silo Hotel opened recently in Launceston and there are Crown Plaza, Hyatt Centric and Marriot hotels under development in Hobart.

Today's travellers are seeking authenticity and opportunities to connect with locals. Tasmania's welcoming culture, friendliness and helpfulness of locals has resulted in Tasmania being one of the most recommended Australian destinations.

There's never been a better time or better reason to visit Tasmania than right now. If you have never visited or it's been awhile, make sure you add a trip to Tassie to your bucket list in 2019!

TOURISM WA

Brodie Carr, Managing Director, Tourism Western Australia

2018 HAS BEEN AN EXCITING AND BUSY TIME FOR THE TOURISM INDUSTRY IN WESTERN AUSTRALIA.

In March, we saw the start of direct air services between Australia and Europe when Qantas launched its London to Perth flights. According to the airline, the flights have been popular, with average load factors at the 90 per cent mark and higher.

More than 3,000 hotels rooms have opened in the Perth area since 2011 including five-star The Westin and QT Perth in 2018. The growing list of recently opened hotels includes the Intercontinental City Centre, Crown Towers, COMO The Treasury, Aloft Perth and Tribe West Perth. The increased supply of hotel rooms and changes to the state's economy, have meant hotel room prices are more affordable than ever before. And when you add to the mix the great collection of funky bars, restaurants and cafes, Perth really is a great place to visit.

We also opened our magnificent Optus Stadium in 2018, which has proven to be a great tourism asset. Not only has it allowed us to attract big international acts to the state, it has opened up an incredible opportunity with AFL tourism. In fact, interim figures from research undertaken by Metrix Consulting show 31,059 interstate visitors specifically travelled to WA for a match at Optus Stadium, and spent about \$34 million during their stay. Next season the majority of AFL matches are on a Friday night or Saturday, which will appeal to interstate visitors. We're confident this will help build on the great results we had for the 2018 season.

But it's not just AFL that will bring visitors to WA in 2019. Next winter we will be Australia's sporting capital when we host Game II of the Holden State of Origin (rugby league) in June, one of the world's most famous sporting



66A lot has changed in Perth over the past few years and these events will give us the chance to highlight the city's transformation??

clubs Manchester United in July and the Bledisloe Cup (rugby union) in August.

Western Australia will be the proud host of three of Tourism Australia's major travel trade events in 2019. Starting with the Australian Tourism Exchange (ATE) in April and followed by Corroboree West in October and Dreamtime in December, the events will be the perfect opportunity to showcase the changing face of Perth to key travel industry specialists from around the world. A lot has changed in Perth over the past few years and these events will give us the chance to highlight the city's transformation, including Optus Stadium, Elizabeth Quay, Yagan Square, the growing bar and restaurant scene and our new and refurbished hotels.

I would like to take this opportunity to thank the Australian Federation of Travel Agents and travel agents around Australia for your support and continued assistance in selling WA as an extraordinary holiday destination.

VISIT CANBERRA

Jonathan Kobus, Director, VisitCanberra

CANBERRA ENDED ITS REIGN AT LONELY PLANET'S THIRD BEST CITY IN THE WORLD TO VISIT IN 2018 WITH RECORD DOMESTIC AND INTERNATIONAL VISITATION.

For the year ending June 2018, the Australian Capital Territory (ACT) welcomed 2.7 million domestic overnight visitors alongside 248,914 international visitors – a record for overnight visitation to the ACT as well as contribution to the ACT economy (\$2.55 billion).

This makes the year ending June 2018 the most successful year ever for overnight visitation in the ACT, with a record contribution of \$2.55 billion to the ACT economy.

Canberra's connectivity to the global marketplace was enhanced with the commencement of Qatar Airways daily services in February 2018 and Singapore Airlines increasing its frequency of service to daily from May 2018. Canberra Airport now receives 14 international flights each week.

In recognition of the influx of visitors arriving through Canberra Airport, a Visitor Information booth staffed by VisitCanberra was opened in mid-December.

VisitCanberra has also appointed an in-destination representative in its key international target market of South East Asia. The representative will be based in Singapore, operating out of the Tourism Australia office.

The ACT Government continues to work to pursue new routes and low cost domestic carriers as part of its Tourism 2020 Strategy to increase aviation access.

Highlights of the year included the National Zoo & Aquarium expansion, the start of Go Boats electric picnic boats on Lake Burley Griffin and Wildfest family glamping at Tidbinbilla. The National Gallery of Australia hosted the spectacular *Cartier* exhibition, a number of new hotels opened and a display of 62,000 poppies outside the Australian War Memorial concluded the Centenary of the First World War commemorations.



66 There is much to look forward to in 2019 with more new hotel openings to come and number of major events which continue to drive visitation??

The ACT Government continues to facilitate investment in important infrastructure and projects that support the growth of tourism. In the first quarter of 2019 a further stage of this transformation begins when Transport Canberra's light rail rolls down Northbourne Avenue, the first stage of a revitalised transport network that will benefit locals and visitors alike. There is much to look forward to in 2019 with more new hotel openings to come and a number of major events which continue to drive visitation to Australia's capital. The year kicks off with a significant sporting event when the first ever test cricket match is played in Canberra from 1 to 5 February with the Domain International Test Match between Australian and Sri Lanka at Manuka Oval.

In winter the National Gallery of Australia will host the exhibition *Matisse: Impression, Sunrise* which is expected to be a very popular drawcard in a traditionally quieter period for visitation.

Agents can stay connected with what's happening in Canberra through our corporate website tourism.act.gov.au.

You can follow VisitCanberra on its social channels using @visitcanberra and #visitcanberra and going to visitcanberra.com.au for information.



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VISIT VICTORIA

Peter Bingeman, Chief Executive Officer, Visit Victoria

SINCE VISIT VICTORIA'S ESTABLISHMENT JUST A LITTLE OVER TWO YEARS AGO, THE COMPANY HAS WORKED HARD TO ESTABLISH A SOLID FOUNDATION TO FULLY DELIVER ON THE VICTORIAN VISITOR ECONOMY STRATEGY AND CAPITALISE ON OPPORTUNITIES IN AN INCREASINGLY COMPETITIVE AND DYNAMIC GLOBAL TOURISM MARKET.

It's incredibly pleasing to see the impact of this hard work, having facilitated more than 450 business events, 70 major events, 180 regional events, and three new marketing campaigns for our interstate, intrastate and international markets. This period of intense productivity has contributed to significant and rapid growth in the visitor economy.

Overall, since 2014-2015, 22,400 jobs have been added and total visitor expenditure for Victoria has seen dramatic growth increasing \$6.8 billion from \$20.5 billion in December 2014 to \$27.3 billion as at July 2018. These results mean Victoria is on track to exceed Government targets of \$36.5 billion visitor expenditure, and 320,700 jobs.

Our major events continue to be the envy of the nation, having acquired Australia's biggest theatrical win, *Harry Potter and The Cursed Child*, and with Melbourne Convention Bureau experiencing a record breaking year for business events - we're maintaining our competitive edge in events.

We have not showed signs of slowing down, with the first half of 2018-2019 playing host to WWE Super Show-Down, Melbourne Esports Open and the Good Food Guide Awards, adding to Victoria's impressive event portfolio.

Alongside our interstate campaign for Melbourne, 'A Twist at Every Turn', Visit Victoria's new intrastate marketing campaign, 'Your Happy Space', continues



⁶⁶We're continuing to develop ways to better tell Melbourne and Victoria's story through events and campaigns that are edgy, creative and impactful⁹⁹

to be executed in above the line mediums, with a digital adaption recently released to inspire the 65 per cent of Victorian pet owners to travel to pet friendly accommodation options across regional Victoria.

Our core priorities remain equally weighted across intrastate, interstate and international visitor markets. We continue to remain focused on developing and marketing unique nature and wildlife products in priority overseas markets to inspire state visitation, winning the hearts and minds of Chinese millennials and building second and third international markets in South East Asia.

Domestically, we're continuing to develop ways to better tell Melbourne and Victoria's story through events and campaigns that are edgy, creative ad impactful, with technology playing a core role in reaching the visitor with the right message, at the right time.

It is an exciting time for tourism and events in Victoria, with the industry achieving a record high in expenditure and jobs growth. We look forward to playing an important role in the continued growth of the visitor economy, embracing growing competition and marketing challenges in a fast-changing world of digital technology.

\$SILVERSEA

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INTIMATE & LUXURY CRUISING

Photo by Steve McCurry Stene mcCm

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INTERNATIONAL TOURISM OVERVIEW

FONDAMENTA DE LA PRESON

Aussies love to travel and outbound is booming. Discover the highlights for many involved in this sector.

FROM CATO

Brett Jardine, Managing Director, Council of Australian Tour Operators

DEFINING THE RIGHT SUPPLIER

CATO represents over 120 Australian based tour operators and wholesalers who work with travel agents on a daily basis. CATO members range from large brands that agents and the travelling public are very familiar with, through to smaller niche operators that focus on specific destinations or style of travel.

CATO provides a platform for these suppliers to come together as a united voice across many areas including but not limited to government affairs, advocacy, networking events and research, all of which are critical for the travel industry.

Regardless of size, all CATO members are ATAS accredited so for retail travel agent, knowing your suppliers are CATO members means peace of mind for you.

When looking for the right supplier to deliver the best holiday experience you're your clients , go to www.cato.travel and use our member search feature on the CATO home page. This simple tool will instantly deliver recommendations based on the criteria you input, saving you many hours of research!

THE ROAD AHEAD

2019 will see CATO come of age with two major initiatives being rolled out. These will not only raise the profile of the twenty-year-old association but also add significant value to members and their distribution partners.

The CATO's: In partnership with AFTA, CATO will deliver an exciting new addition to the travel industry's 'night of nights'. The 2019 AFTA National Travel Industry Awards (NTIA) will include a dedicated segment within the event that will recognise and rewards front line travel consultants across four categories.

The CATO award categories will be promoted alongside the NTIA categories and be included in the NTIA promotional and judging processes. There will be no



voting for any of the CATO categories - all winners will be determined via the same two-step submission and judging process used by AFTA to ethically and fairly determine winners.

- The four categories are;
 - Consultant of the Year Group Touring
 - Consultant of the Year Adventure
 Consultant of the Year Ski
 - Consultant of the Year Ski
 - Consultant of the Year F.I.T (wholesale, self-drive, rail, resorts)

Research: Understanding the size and depth of any market is critical when it comes to developing and delivering appealing product for consumer consumption. To date the land-supply sector has struggled to define the number of Australians taking overseas holidays, where, when and for how long they travel.

In Q1, 2019 CATO will roll out the inaugural land-supply report that will start to unravel a number of facts and provide a golden opportunity to spread the word about the depth of experience a land-based holiday can deliver.

We already know more than ten million Australians travel overseas each year and around sixty percent of these are on holiday, so we look forward to delivering some reliable and relevant aggregated data that will enable CATO to speak with authority on behalf of the land-supply sector. This will be used as the basis of a public relations strategy to engage, inspire and enthuse the travelling public, the travel industry and the media.

FROM IIPT

Gail Parsonage, President, International Institute for Peace through Tourism

INTERNATIONAL INSTITUTE FOR PEACE THROUGH TOURISM (IIPT) BEGAN OVER 30 YEARS AGO WITH THE AUSTRALIAN CHAPTER BEING FORMED IN 2001.

From the beginning, AFTA has been a supporter of IIPT and became a coalition partner to actively demonstrate the vision of travel and tourism, one of the world's largest industries, becoming the world's first global peace industry; and the belief that every traveller is potentially an "Ambassador for Peace."

The influence and power of the travel industry and the travelling public cannot be underestimated. Through macro and micro activities, the industry is constantly demonstrating the economic reality of tourist spending to our economy but also in helping to reduce poverty in developing countries. The contribution to international understanding, the importance to the preservation of cultural and historic sites and the value of tourism as a tool to assist in reconciliation, are all part of the initiatives which bring about a peaceful and sustainable world.

IIPT is a not-for-profit organisation and we rely on the tourism industry to help promote the concept of each and every traveller, as well as all travel agents, actively becoming ambassadors for peace. This can be very simple. The mere extension of good will to visitors and hosts can be an act of peace.

IIPT has continued to initiate global peace parks around the world and we are extremely pleased to have the second Australian IIPT peace park at the beautiful and historic location at Q Station, Sydney Harbour National Park. This joins our other Australian peace park at Leura in the Blue Mountains, and with ongoing discussions and negotiations at several other tourist destinations around Australia.

This year, the Yunnan Province in China, and Harrisburg in Pennsylvania, USA were also added to our global peace parks project.



The IIPT "Travel for Peace" Tour to Jordan was successfully achieved, with delegates from Australia participating in the special experience. It included an overview of the unique historic and scenic icons of Jordan and the opportunity to visit the UNHCR Syrian Refugee Camp in Azraq, with visits also to a school and refugee families. The visits allowed the IIPT delegates to show solidarity and understanding to the displaced families and reassure them that they are not forgotten people. It was a moment of genuine friendship and peace with the Syrian refugees. Food parcels, clothing and school items were also distributed.

Another notable event was the announcement of the IIPT "Champions of Challenge" at WTM London. This award honours leaders who have stood forward in exceptional times of challenge and have made a real difference through words and actions. IIPT seeks to recognise exceptional leaders who embody the power of tourism to bring peace and stability.

On a more local level, IIPT has

contributed to a number of tourism conferences and summits, including the World Indigenous Tourism Alliance in Waitangi, New Zealand, the UNWTO Regional Conference on Climate Change and Sustainable Tourism Development in Fiji and the Australian Indigenous Tourism Conference in Lorne, Victoria.

The future for IIPT is still strong, as the world continues to seek peace. The tourism industry is still one of the strongest and most valuable tools that we have to achieve this. Without peace there is no tourism industry.

Peace parks, recognition of leaders and participation in tourism conferences are some of the ways that demonstrate tourism's role in promoting peace.

The other most important role is the Australian travel agent. We want you to take up the challenge and actively supporting IIPT, adopting the credo of the peaceful traveller and promoting at every opportunity the importance of responsible and sustainable tourism which leads to a peaceful world.

FROM ACCORHOTELS

Simon McGrath, Chief Operating Officer, AccorHotels Pacific

ACCORHOTELS IS ONCE AGAIN DELIGHTED TO SUPPORT AFTA AS LUXURY HOTEL PARTNER FOR OUR SECOND CONSECUTIVE YEAR.

2018 was a strong year for AccorHotels, having reached a major milestone with our 1,000th hotel opening in the Asia-Pacific, with well over 200,000 rooms represented in the region. The portfolio now includes some of the world's most iconic and respected brands such as Raffles, Orient Express, Banyan Tree, Fairmont, Sofitel, Delano, Mondrian, SLS, Swissôtel, and Mövenpick.

The acquisition of the Mantra Group portfolio of properties expanded our network by 138 hotels and 20,000 guestrooms, with the addition of Art Series, Peppers, Mantra, and Breakfree branded properties across Australia, New Zealand, Hawaii and Indonesia.

This strategic acquisition takes AccorHotels' network tally to over 330 hotels and resorts across the Pacific region. These brands will be consolidated under our existing portfolio, which holds such a strong resonance with the Australian public. Maintaining this level of recognition while continuing to innovate remains a key priority for the group.

A significant luxury hotel opening attracted worldwide attention in November, with SO/Auckland - the first SO/ branded hotel to open in the Pacific region. Located in the heart of Auckland city and occupying the former Reserve Bank, SO/Auckland challenges traditional hotel norms, and joins an artistic portfolio of only seven very individual hotels worldwide.

To end 2018 on a high note, we were delighted to announce the first Orient Express hotel under AccorHotels will open in the landmark King Power Mahanakhon Building in Bangkok in late 2019. Orient Express Mahanakhon Bangkok will feature 154 rooms including nine suites and two penthouses, as well as an entire floor



66 Whilst new competition into markets such as Brisbane and Perth keeps us on our toes, it also draws renewed interest from national and international travellers, so we certainly welcome the investment??

devoted to wellness. At 78 storeys, King Power Mahanakhon Building is currently the tallest building in Bangkok and a visual landmark thanks to its dramatic exterior, which is encased in a glass curtain with cuboid spiral cut-outs. We are fortunate that tourism remains a tier one economic sector and, pleasingly, the industry continues to receive solid investment from all states and territories. New supply into Sydney, Melbourne, Perth and Brisbane has had an effect on market conditions, however with strong demand, we don't foresee the new supply having a long-term impact. Whilst new competition into markets such as Brisbane and Perth keeps us on our toes, it also draws renewed interest from national and international travellers, so we certainly welcome the investment.

One in eight Australians are now part of our Le Club AccorHotels loyalty program. Rewarding guests with benefits and personalising each stay is a privilege.

As always, we truly value the immense contribution that our travel agency partners play in AccorHotels' success story. On behalf of the entire team at AccorHotels, we look forward to strengthening our relationship with our travel agent community in 2019.



OUTBOUND TRAVEL REACHES NEW HEIGHTS

There's no doubt that the Australian travel industry is undergoing significant change, but what has remained constant over the last 12 months has been the apparently insatiable desire of Aussies to holiday abroad.

The most recent figures from the Australian Bureau of Statistics indicated that in some months more than one million people are heading overseas, with departures up a healthy 5.6% yearon-year.

For the year to 30 June 2018 the overall total "short term resident return" figure was 10.76 million, meaning the equivalent of almost half the Australian population took an overseas trip last year. That was significantly higher than the 9.07 million short-term visitor arrivals during the year, and outbound travel also grew faster than the inbound sector over the last 12 months.

Looking at the figures for October 2018, the stand-out destination was Indonesia, reflecting the perennial popularity of Bali holidays. During that month more than 132,000 Australians flew to Indonesia, a year-on-year uplift of more than 12%. The USA was also popular, coming in second spot during October with a total of 126,600 Australian travellers. However growth to the USA was much slower, with the figure increasing just 1.9% compared to the previous corresponding period. Similarly New Zealand, which dropped to third position, grew just 0.9% versus October 2017 to record a total of 119,300 Australian travellers.

Travel patterns have certainly changed, as Australians adapt to perceived risk levels overseas. One of the fastest growing destinations last year was Japan, which saw a 12.1% increase in Australian travellers just in October. Japan was the seventh most popular outbound destination for Aussies that month, with 47,800 passengers. That put it just ahead of long-time favourite Italy, which grew 10.7% year-on-year to record an October monthly total of 44,100 Australian visitors.

The figures change slightly when looking on an annual rather than a monthly basis. According to AFTA's *Travel Trends* report for September 2018, New Zealand was the top outbound destination for the year, with just over 1.4 million Australian visitors, followed by Indonesia with 1.2 million and the USA rounding out the top three with 1.08 million Aussie travellers. However all three of those top markets showed minimal growth or a slight decline - in contrast to the rise of places like Japan, India and China which all enjoyed double digit passenger number increases.

The only top ten destination to see a decline in the last year was Fiji, which dipped 0.2% to 342,100 Australian travellers, while mid-level growth of around 4% was recorded for places like the UK, Singapore and Thailand. The AFTA report also breaks out the reasons that Australians travelled to the various destinations, with holidays being the overwhelming driver for Indonesia at 86.4%, just ahead of Thailand and Fiji which both recorded 78% of visitors travelling for a holiday. By contrast, more than half of Australian travel to India during the year was for the purpose of visiting friends and relatives (VFR), while just 25% of Aussie visitors to India were there on holiday.

Two thirds of Australian visitors to the USA were travelling for holiday purposes, while the corresponding figure for China was 38.5%. In terms of business travel, the largest proportion of Australians travelling Right: Japan has enjoyed double digit passenger number increases in 2018.



for corporate reasons went to Singapore at 17.8%, just ahead of China at 16.8% and then New Zealand at 15.6%.

With all that travel activity there's no wonder that aviation uplift continued to grow out of Australia to service the demand. The lion's share of airline capacity was held by the Qantas Group, with Qantas and Jetstar combined comprising an international market share of just over 25%. Singapore Airlines was next in line with an 8.2% passenger market share, just ahead of Emirates with 7.9% during August 2018. Virgin Australia was in the next position with a 6.4% international market share, ahead of Air New Zealand with 6.2%.

Next in line was Cathay Pacific with 4.4%,

followed by Qatar Airways and Etihad Airways with 3.3% each, and rounding out the top ten was China Southern Airlines which recorded an August 2018 passenger market share of 3.1%.

Despite the widely lauded growth of the cruise sector, passenger numbers leaving Australia by sea comprised only a small fraction of the total, with aviation still the major driver of travel. The arrival of new generation aircraft allowing longer, narrower routes is likely to see further growth in the number of nonstop destinations served from Australia in the coming year, and the ongoing rise in passenger numbers can only be good news for the entire industry, no matter where in the distribution chain you sit.

Left: Australians travelling to the USA increased by 1.9% this year, with two thirds of travellers visiting for holiday purposes.

Right: New Zealand was the top outbound destination for the year with 1.4 million Australian visitors.





GET TO KNOW THE GLOBUS FAMILY

FOR MORE THAN 90 YEARS, THE GLOBUS FAMILY OF BRANDS HAS BEEN OFFERING HOLIDAYS WITH MEMORABLE EXPERIENCES ALL OVER THE WORLD.

Comprised of coach tour companies Globus and Cosmos, river cruise operator Avalon Waterways and independent touring program Monograms, the company offers hundreds of unique itineraries all over the globe for travellers to choose from.

Avalon Waterways

Avalon Waterways aims to provide its travellers with a personal experience. The company follows the mantra "it's not about looking a certain way, but about feeling a certain way" and works to provide its guests with "time to breathe and the time and space to step out and see the world your way".

Avalon Waterways provides travellers with a means to explore the world, without leaving behind luxury. Its cabins blend luxury and comfort with open-air balconies and outward-facing beds to bring the outside in and provide guests with some of the sweetest views. Avalon Waterways' Panorama Suites on its Suite Ships are 30% larger than the industry standard staterooms and boast wall-to-wall and floor-to-ceiling windows which open wider than any

other.

HIGHLIGHT ITINERARY: 8-DAY ROMANTIC RHINE

This iconic Rhine River cruise meanders from Basel to Amsterdam taking in the rolling hills scattered with castles and sprawling vineyards. Highlights include the fairytale village of Colmar, an excursion to Heidelberg Castle and a choice of activities in gothic Cologne. Priced from \$3,894ppts.

HIGHLIGHT ITINERARY: 12-DAY SPIRIT OF

THE ROCKIES

This itinerary travels through the Canadian Rockies, taking in breathtaking scenery and fun experiences. A tour highlight is a two-day journey on board the Rocky Mountaineer train to Banff National Park. Along the way, the itinerary features wild rivers, majestic mountain ranges, and beautiful lakes. Priced from \$7,499ppts. Travel with Globus isn't solely about the destination, but about

Globus

how travel makes its guests feel. The brand promises "to craft memories you'll want to relive forever".

With more than nine decades of experience in introducing travellers to the world's most beloved destinations, the company has learned a thing or two about the undiscovered spots that tell the story behind each country. Globus explores off-the-beatenpath locations with the charm, tradition and cultural beauty that can only be found in the authentic towns and landscapes of the world. From the undiscovered hamlets of Great Britain to the vineyards and hills of Italy and the hidden waterfalls of North America that only the locals know, Globus shares its favourite, less-travelled treasures with its guests.

Produced in collaboration with Globus family of brands

Cosmos

Whether your client is a seasoned traveller looking to tick another destination off their list, or someone trying to make that once-ina-lifetime holiday happen, Cosmos can help them get there.

With over 50 years of heritage, Cosmos offers tours that clients will never forget – creating the experience they've always dreamed of and showing them the ones they never even thought of, without breaking the bank. Cosmos will take care of the planning and logistics, so clients can live their dreams.

Most recently Cosmos has been working on combining the essential features of its tours with a personalised approach to daily itineraries. Cosmos Lite offers hassle-free travel with the ability to tailor an itinerary to a client's interests, budget and pace so they can focus on the adventure, not the arrangements.

Bundling freedom, flexibility and affordability, Cosmos Lite aims to present a unique, independent touring style, where the itinerary presented at each destination is like a blank canvas – open for custom tailoring. There are no early morning starts and fiveminute photo stops at big sights, instead there's a varied menu of optional excursions and activities what Cosmos calls touring a la carte.

HIGHLIGHT ITINERARY: 16-DAY SPAIN, PORTUGAL & MOROCCO

This Spain, Portugal, and Morocco tour rolls three glorious countries with rich histories and distinct cultures into one itinerary. It features overnight stays in Madrid, Seville, Granada and the Costa del Sol in Spain; Coimbra and Lisbon in Portugal; and Rabat, Marrakesh and Fez in Morocco. Priced from \$2,679ppts.

HIGHLIGHT ITINERARY: 10-DAY VENICE, FLORENCE & ROME

This itinerary sees travellers receive VIP access to Venice's St Marks Basilica to admire its gold mosaics, tour the many piazzas of Florence with a local and visit Rome's Vatican Museums and the Colosseum First class train tickets between each city and transport to each train are included in the package, allowing guests to sit back and enjoy the ride. Priced from \$2,429ppts.

Monograms

Monograms defines a true explorer as someone who follows their own feet and who has the confidence to break away from the well-trodden path. Monograms caters to this kind of traveller by arranging accommodation for hasslefree independent travel, but also provides a friendly, expert Local Host to provide assistance. Clients who take advantage of Monograms "YourWay" also have the flexibility to personalise their holiday by choosing the number of nights they wish to stay in select European cities.

family of bra<u>nds</u>

For over 90 years, the Globus family of brands have been curating perfectly planned holidays, leaving our guests with more time to embrace their experiences rather than worrying about how to do it.

No matter which of our trusted brands you choose, you will return with treasured memories you'll want to relive time and time again.



UPDATE: BRITAIN

VISITBRITAIN IS WORKING TO MAKE IT EASIER FOR AUSTRALIANS TO BUY BRITAIN BY EXPANDING THE PRODUCT AND EXPERIENCES ON OFFER WITH AUSTRALIA'S LEADING TRAVEL INTERMEDIARIES.

And we're working with airline partners to make it easier for Australians to get to Britain, promoting new and direct services into London and regional Britain. We're telling Australians about the many unexpected and off the beaten track experiences through our Find Your GREAT Britain global campaign as well as via our always on digital and social channels.

We'll continue to showcase the diverse range of products and experiences found around Britain. In 2019 we'll focus on the key gateways of London, Manchester and Edinburgh, how easy it is to get around by rail or car, what makes Britain's national parks unique and share 2+ day itineraries in our key regional areas making it easier than ever to deliver on your customers' needs.

WHAT'S NEW IN 2019

- The Wales Way is a group of three national touring routes that cross the country's most epic landscapes, showcasing its fascinating history, coastlines and attractions.
- Manchester International Festival (MIF) is the world's first festival of original, new work and special events and the biggest event on Manchester's cultural calendar from 4 – 21 July 2019.
- Britain will play a starring role in several new major movie releases in 2019, as well as leading the way with some of television's biggest



hits. *Mary Queen of Scots* will be in cinemas from January 2019 and stars Aussie Margot Robbie, while *Downton Abbey* the movie and *Bond* return to the big screen.

• For sports fans, Britain hosts the ICC Cricket World Cup and Netball World Cup in 2019.

UPDATE: CANADA

AUSTRALIAN TRAVELLERS MADE THEIR LOVE FOR CANADA KNOWN THROUGHOUT 2018, TYPICALLY STAYING LONGER AND SPENDING MORE THAN ANY OTHER FOREIGN MARKET.

More than 370,000 Aussies are expected to visit Canada during 2019, with lesser-known regions, such as Quebec and the Atlantic provinces set to be the next big thing.

Australians are seeking experiences that tug at their heartstrings. Whether it's witnessing the magical aurora borealis, encountering polar bears in the wild, or hearing the stories of the First Nations, Canada offers transformative experiences that are remembered for a lifetime.

Long renowned as one of the best winter destinations in the world, Canada's après ski scene is increasingly popular, along with activities such as sleigh rides, snowshoeing and outdoor hot tubs popular among families and the 55+ demographic, while millennials aged 25 - 34 can't get enough of dog mushing, ice-climbing and canyoning.

Authentically Canadian experiences are set to be a big hit in 2019. In addition to outdoor adventures, such as kayaking the turquoise lakes, wildlife encounters, wilderness hikes and road trips, unique culinary experiences are of particular interest. Aussie visitors are keen to not only taste the real Canada, but also discover the origin of Canada's iconic seafood and farm-to-table fare. This means meeting the farmers in British Columbia's Okanagan Valley who supply many local restaurants with fresh produce or going getting to know the lobster anglers of Nova Scotia. Experiential products are rising in popularity, such as digging for clams



on Prince Edward Island, or foraging for herbs in Quebec.

With Air Canada's direct daily flights from Sydney and Brisbane, and a new direct service now operating in Melbourne, it's easier than ever before for Aussies to make 2019 the year they visit Canada.

UPDATE: COOK ISLANDS

LAST YEAR WE SAID "KIA ORANA" TO NEARLY 26,000 VISITORS FROM AUSTRALIA – THAT'S AN 8.8% GROWTH ON THE PREVIOUS YEAR!

This growth comes from more and more Aussies discovering the beauty of the Cook Islands, which is not only for the stunning scenery but the ability to find rest and relaxation, romance, family fun, activity and adventure. Our outer islands are also easily accessible with just a quick flight and we find that most Australian visitors include a trip to Aitutaki to experience what Lonely Planet calls "The most beautiful lagoon in the world".

The Cook Islands will continue to deliver

amazing experiences in the coming year with new activities on offer. We've seen night stand-up paddle boarding tours, sea turtle safari tours, progressive dinners, tuk tuk sunset bar tours and more popping up across the island. Air Rarotonga has also just launched a new three-day tour of Mauke (outer island) for visitors wanting to explore a truly remote part of the South Pacific.

Accommodation offerings are also booming in the Cooks with the launch of the all-new Moana Sands Lagoon Resort in Muri Beach, more holiday homes coming online and current resorts extending their footprint and adding additional rooms and villas.

Cook Islands Tourism has also welcomed a new sales ambassador in Australia



so if any agents have questions on our stunning destination, feel free to contact Matt Brookfield at office@ cookislandstourism.travel. With nearly 50% of the visitors booking through a travel agent, we want to say "Meitaki" to everyone who has played a part in the success of the Cook Islands in Australia!

UPDATE: HAWAI'I

THERE'S NO BETTER TIME TO SAY ALOHA TO HAWAI'I.

The Hawaiian Islands continue to lead the way for Australian holidaymakers, with over 320,000 visiting in 2017 and 2018 set to deliver even more visitors. Australians are particularly fond of the Aloha State, having a long length of stay in Hawai'i, around 9-10 nights, and have a repeat visitation rate of just under 50%. From sun, surf and sand to hikes over volcanoes and helicopter trips over lush rainforest, Hawai'i is a destination that can be experienced differently time and time again.

With six main islands to explore (O'ahu, Maui, Kaua'i, Moloka'i, Lana'i and the Island of Hawai'i), Hawai'i offers countless amazing experiences for the Australian traveller. With a year-round climate perfect for any getaway, the Hawaiian Islands are brimming with tours, excursions and experiences to help you explore Hawai'is natural beauty. Hawai'i has everything for both the relaxed and active traveller. Research shows that while travelling in Hawai'i, Australians are most likely to be found taking in a bit of R&R, shopping, eating or hitting the beach – no surprises there! More interesting is the fact that a substantial number Australian travellers still book trips to Hawai'i through a travel agent, showing the importance and significance of an agent's expertise.

Working with agents is Hawai'i Tourism Oceania, the Sydney based team ready to assist with planning a trip, connecting you to accommodation partners or simply chat through an idea! Continuing to promote Hawai'i to the already engaged Australian audience, Hawai'i Tourism Oceania will be focussing on key themes such as multi-island travel, culture, sport, luxury, and romance through 2019. The new year also brings



with it the successful annual Aloha Down Under roadshow, with delegates from Hawai'i and the Hawai'i Tourism Oceania team visiting Sydney and surrounds, Melbourne and Brisbane in August. For more information or to get in touch with Hawai'i Tourism Oceania, please contact them at info@hawaiitourism.com.au.

UPDATE: HONG KONG

2018 WAS AN EXCITING YEAR FOR HONG KONG WITH AN ENDLESS ARRAY OF "WOW" FACTOR DEVELOPMENTS DEBUTING, ACROSS ACCOMMODATION, EXPERIENCES AND TRANSPORTATION.

The Murray Hotel opened in February followed by Hotel VIC in July. Ocean Park's first hotel, Hong Kong Ocean Park Marriott then opened in October, to name just a few.

On the transportation front, the talk of the town certainly was the opening of the high speed rail in September, connecting Hong Kong to 48 destinations in China. A journey to Guangzhou is now 44 minutes. The opening of the Hong Kong-Zhuhai-Macau Bridge has also been a milestone and major engineering feat, following 10 years of construction. Spanning 55km, the bridge is the world's longest tunnel and sea crossing.

The launch of the next phases of the Hong Kong Tourism Board's (HKTB) Great Outdoors Hong Kong and Hong Kong Neighbourhoods - Sham Shui Po campaigns, has highlighted an unfamiliar side of Hong Kong. Through both campaigns the tourism board has encouraged visitors to spend some time exploring the more local areas to get an insight into local life, culture and environments. Both themes have resonated strongly with the Aussie market and additional phases will launch in 2019.

2019 looks just as strong, with The Rosewood and St Regis scheduled to open in 2019 plus more towards the later end of 2019 – as well as a endless flow of new restaurants, bars and experiences.

Our HK Specialists programme is growing from strength to strength. Make sure you complete our training



program to become a specialist today – specialisthk.com/au.

We will continue to work with our partners to ensure our agents are aware of the latest happenings in Hong Kong through updates and our monthly newsletter. For more information contact Adam, adam.rodriguez@hktb.com.

UPDATE: IRELAND

FROM VIBRANT CITIES, COLOURFUL VILLAGES, AND AWARD-WINNING VISITOR EXPERIENCES, IRELAND IS PACKED FULL OF UNIQUE ACTIVITIES.

There are world-renowned golf courses to play, walking and cycling trails to explore, and some of the most spectacular touring routes in the world! Australian visitors can explore touring routes like the Wild Atlantic Way, a stunning coastal drive along Ireland's western seaboard, which offers visitors an opportunity to connect with friendly locals in towns and villages along the way; Ireland's Ancient East, where 5,000 years of history is brought to life by the best storytellers in the world. Ireland has also appeared on both the big and small screen with locations in Northern Ireland making a spectacular backdrop for scenes in the ever-popular HBO Game

of Thrones[®] series. More recently the magnificent Skellig Michael, a UNESCO World Heritage Site was used as a filming location for the latest *Star Wars* films.

Australian visitors come in greater numbers than ever with over 150,000 arrivals to Ireland in the first nine months of 2018, a 7.6% increase on 2017. Australia is ranked in the top 6 markets in terms of value, with visitors spending an average of two weeks on the island of Ireland. In fact, these visitors are amongst the most valuable as they spend twice the average spend of an overseas visitor.

Good air access is critical for strong visitor growth with Emirates, Etihad, Qatar Airways, and most recently Cathay Pacific providing one-stop connections to Dublin.

2019 will be another exciting year with the 148th Open Golf Championship making a historic return to Northern Ireland in July, thus confirming Northern Ireland as a world-class golf destination.



Tourism Ireland is delighted to be launching a new brand campaign for 2019, to inspire visitors to "Fill Your Heart with Ireland". So, what are you waiting for, come and see for yourself!

To test your knowledge and become an Ireland Specialist visit our website www.trade.ireland.com.

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UPDATE: ITALY

ITALY HAS BEEN CONFIRMED ONCE AGAIN AS THE SECOND MOST POPULAR EUROPEAN DESTINATION FOR AUSTRALIAN TRAVELLERS, AFTER THE UK, WITH 250,000 AUSSIES VISITING ITALY LAST YEAR, A 16% INCREASE.

With the quincentenary of Leonardo da Vinci's death coming up in 2019, numerous museums in Florence, Milan and beyond are organising initiatives and celebrations for "Leonardo 500". Milan will showcase an exhibition entirely dedicated to his remarkable inventions. Thanks to the latest technology, visitors will be able to browse through his digitised writings, which will also grab the attention of children. Furthermore, there are 200 interactive machines that display 3D images of his works..

And if that wasn't enough, the 8,000 year old southern city of Matera, in Basilicata, has been named Europe's Capital of Culture for 2019. In Matera, where people lived in caves carved in the hill over centuries, the fusion between landscape and settlement is particularly stunning. The cave dwellings of the Sassi are the most extensive example of their kind in the Mediterranean. Nowadays, however, the Sassi district has gone through extensive re-development and hosts some incredible cave hotels, private homes and restaurants, lovingly restored to enhance their original features. The Italian National Tourist board has just launched a global social media campaign #treasureitaly focusing on sustainable tourism. This heme, together with Leonardo 500 and Matera, Capital of European Culture will be the focus throughout 2019. Next year, Milan will



also be a focus for the LGBTI community thanks to the 2020 global convention.

Due to its world famous culinary tradition and now with 54 UNESCO World heritage listed sites (more than any other country in the world) any time of year is the perfect time to visit Italy.

UPDATE: JAPAN

JAPAN HAS ENJOYED ANOTHER IMPRESSIVE YEAR OF VISITOR NUMBERS WITH MORE THAN 26 MILLION INTERNATIONAL VISITORS TRAVELLING INTO THE COUNTRY BETWEEN JANUARY AND OCTOBER 2018.

This is an increase of almost 10 percent compared to the same period of the previous year.

Australia has played an important role in this overall growth. Of the 352,931 Australian visitors between January and August 2018 the vast majority (91 percent) visited Japan as tourists.

In 2019 Japan will host the Rugby World Cup, from 20 September through to 2 November, and expects up to 400,000 international visitors during the six weeks of the tournament. This will be a huge boost to the Japanese economy.

A dedicated website has been created to help Australian visitors plan their

travels. The resource, visitjapan2019.com, offers rugby fans suggested itineraries to help plot their visit to the tournament's 12 host cities and includes information about local restaurants, places to stay, things to see and do.

As Japan readies itself to host rugby's biggest tournament and receive the influx of visitors, some of the major new hotel and attractions openings include:

- Hyatt Place Tokyo Bay: Known for its casual and contemporary design and features, this new hotel is conveniently located close to the Tokyo Disney Resort, the 10-story hotel will have 365 rooms.
- Marriott Resort and Spa, Ishigaki: With more than 360 rooms, this hotel will be the largest in Okinawa's remote islands – Japan's tropics overlooking the East China Sea.
- MoominValley Park: Originally a 1940s series of illustrated books from Finland the 'Moomin' hippo-like



cartoon characters have been adored in Japan for decades. MoominValley Park, set to open in March 2019, is located in the tranquil Japanese countryside of Saitama, near Tokyo.

The Japan National Tourism Organization (JNTO) monthly newsletter is the best way to subscribe to news, updates and wholesaler products.



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UPDATE: NEW CALEDONIA

2018 HAS BEEN AN EXCITING YEAR FOR NEW CALEDONIA, WITH THE DESTINATION REPORTING AN UPLIFT IN AWARENESS AS WELL AS CONTINUED VISITATION GROWTH.

In 2018, the destination celebrated the tenth anniversary of six parts of New Caledonia's lagoon being named a UNESCO World Heritage Site. Offering a plethora of water activities and adventures for all types of travellers and interests – think lazy beach days, diving amongst shipwrecks or sailing on a luxury catamaran – the lagoon is quintessential to New Caledonia's tourism identity and its UNESCO credentials are testament to the destination's commitment to preserving its natural beauty.

To mark this anniversary, New Caledonia Tourism hosted a series of trade famils – including the annual Rendezvous Workshop - as well as media and influencer famils, to encourage firsthand experience of the destination. In addition to this, the stunning lagoon and West Coast region played backdrop to *The Bachelor Australia* finale, with over one million Australians tuning in to see the best of the destination.

2019 is set to be just as exciting, with a focus on showcasing the range of activities and soft adventure possibilities available across New Caledonia's diverse regions. With options for biking, hiking, horse-riding, surfing and more on offer, plus exciting events and activities like the Bike Festival in Bourail, the Isle of



Pines Trail Race, and the New Caledonia Triathlon in Noumea set to take place, it's guaranteed there will be something to appeal to all ages, skills and interests. New Caledonia Tourism will also relaunch its online training platform to provide agents with the most up-to-date insights into the destination and its soft adventure offerings.

UPDATE: NEW ZEALAND

NEW ZEALAND CONTINUES TO BE AUSTRALIA'S PREFERRED INTERNATIONAL DESTINATION.

In 2018, New Zealand welcomed 3.79m visitors to its shores which is expected to continue to grow steadily, reaching 5.1m visitors annually by 2024.

Tourism has remained New Zealand's top earner for foreign exchange and is on track to exceed the industry's goal of \$41b total revenue by 2025.

A key part of our work over the last financial year was to position and refresh the 100% Pure New Zealand brand – which is soon to be a 20 year-long campaign – to keep ahead of global tourism trends.

Locally, we've continued our campaigns to drive regional dispersal and seasonal visitation, by encouraging Australians to take a self-drive holiday over the spring and autumn periods.

With almost half of all travellers to New Zealand booking through a travel agent, trade is an essential component of the consumer journey. In the trade sector, we continue to grow the 100% Pure New Zealand Specialist Programme and develop digestible content that inspires and enables the trade to design highvalue itineraries to New Zealand.

Future proofing the New Zealand tourism industry also played a huge part in our work in FY18. We worked collaboratively with several organisations and companies on initiatives to help ensure New Zealand is destination ready for tourism growth. Tiaki Promise was the first iteration of this. Tiaki Promise is an international visitor pledge encouraging visitors to experience New Zealand in a way that keeps them



safe, protects the natural environment, respects all cultures and preserves the country for future generations.

The focus for the next financial year will be to continue our work around Tiaki Promise, destination readiness and enriching New Zealand, to ensure that growth is sustrainable, and that our efforts improve experiences for visitors and Kiwis alike.

UPDATE: SINGAPORE

WITH A NEW GLOBAL BRAND LAUNCH AND A LEADING ROLE IN A HOLLYWOOD BLOCKBUSTER, 2018 HAS BEEN A STRONG YEAR FOR SINGAPORE, WITH NO SIGNS OF SLOWING DOWN FOR 2019.

The first half of 2018 (January to June) saw an increase of 2% in International Visitor Arrivals from Australia to 533,000, compared to the same period in 2017. In February, we launched the new global brand Passion Made Possible in Australia with a campaign targeting Australian foodies. Leading chefs from both Singapore (Malcolm Lee and Janice Wong) and Australia (Adam Liaw and Anna Polyviou) were engaged to create a special menu inspired by the Lion City which was unveiled at an innovative, world-first "virtual" dinner party where guests from both countries could engage with each other via TV screens. Later in the year we partnered with Roadshow Films to promote the release of the Hollywood blockbuster *Crazy Rich Asians*, magically brought to life in Singapore and showcasing the city's cultural heartbeat, diverse dining scene and stunning scenery. Singapore's unique 'after dark' offerings were also championed, especially when five Singapore bars were recognised in the World's Best 50 Bars List in 2018, cementing Singapore's status as a world-class cocktail destination.

Looking forward to 2019, Changi Airport is set to open its much-anticipated extension: Jewel Changi Airport (Jewel), offering travellers a tourist destination in its own right. Jewel will boost the airport's already impressive offerings that have earned it the title of the 'Best Airport in the World' for six consecutive years by Skytrax. Meanwhile, one of the most well-known nightclub brands in the world:



Marquee, is slated to hit Singapore's shores in the iconic Marina Bay Sands complex. We also look forward to the opening of three new hotels on Sentosa from the Far East Hotel Group: Village Hotel Sentosa, The Outpost Hotel and The Barracks Hotel, and of course the reopening of the beloved Raffles Hotel.



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UPDATE: VANUATU

BOUTIQUE HOTEL OPENINGS, NEW SOFT ADVENTURE TOURS AND THE LAUNCH OF A VANUATU-DEDICATED TRAVEL APP HAVE MADE 2018 ANOTHER EXCITING YEAR FOR THE SOUTH PACIFIC DESTINATION, AND VANUATU EVEN MORE APPEALING FOR AUSSIE TRAVELLERS.

The latest addition to the archipelago's boutique accommodation offering is Rockwater Resort, which soft launched in May 2018. Built into a limestone cliff overlooking the ocean on the unexplored west coast of Tanna Island, this sophisticated eco-resort, reminiscent of the properties you'll find on Santorini Island, makes for an unforgettable getaway.

Vanuatu isn't all about relaxing oceanside and sipping cocktails though. Venture beyond the main islands and explore the untouched Nguna and Pele Islands with Vanuatu Eco-Tours' new three-day, two-night adventure. Providing an unforgettable ecoexperience, this tour has been designed to offer travellers the opportunity to immerse themselves into the traditional way of life. Travellers can expect to visit pristine tropical islands, scramble over extinct volcanoes and experience the local culture firsthand.

For those wanting to explore solo, take a self-guided tour with help from the Vanuatu Bucket List app. Free of charge and designed to help travellers experience the best this beautiful country has to offer, Vanuatu Bucket List offers tips and tricks on where to stay and eat out to the best adventure activities and discount deals. The app can also be downloaded to use offline, so travellers aren't dependent on a Wi-Fi connection.

Looking ahead, 2019 is set to be an exciting year with the highly anticipated



Black Pearl Resort & Spa slated to open on Vanuatu's largest island, Espiritu Santo. Offering five-star accommodation, beautiful bungalows in the local fale style, a restaurant, spa, gym and pool, the property's opening is set to be a 2019 highlight.

For more information please visit http://vanuatuspecialists.com.

UPDATE: USA

AUSTRALIAN TRAVELLERS RATE THE USA AS THEIR NUMBER ONE LONG HAUL DESTINATION, AS BRAND USA CONTINUES TO PROMOTE THE DIVERSITY OF EXPERIENCES IN THE USA.

With such a wide range of destinations and experiences on offer, whatever your client is looking for, you can rest assured the USA can deliver an unforgettable holiday for them. In 2019, promotional efforts for the USA will focus on U.S. music experiences, off season travel and luxury travel packages.

Key to our promotional strategy is engaging travellers with our multiscreen approach – from mobile to giant screen and everything in between. In 2018 Brand USA launched a new film, *America's Musical Journey*, staring Aloe Blacc exploring the musical heritage of America. Also we have launched GoUSA TV, a travel entertainment channel available at viewers' fingertips where people can watch a range of content about travel to the USA. Including full episodes, documentaries, and films told from the diverse perspectives of real people with no subscription, fees, or logins required. It is available for download on your iOS or Android phone or on Apple TV, Amazon Fire TV or Roku.

In 2019 Brand USA plans to continue to support travel agents to help them promote travel to the USA to their clients. The newly launched travel trade website has a range of tools including route planners, free marketing assets and inspiration guides. Check out www.traveltrade.visittheusa.com. Travel agents can become USA experts with the USA Discovery Program online



training program. At

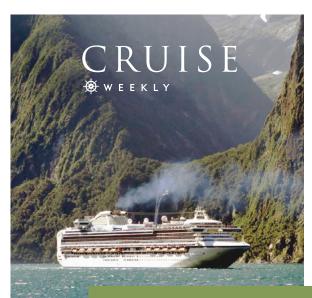
www.usadiscoveryprogram.com.au you can complete a range of regional, themed and destination badges. Look out for incentives and promotions on the Discovery Program throughout the year.

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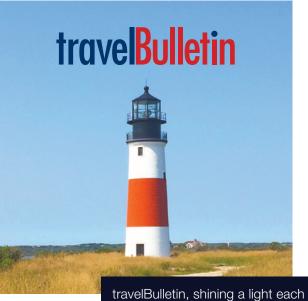
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There are several high-end rail operators in India to choose from, all possessing the requisite comfort to satisfy even the most demanding appetites of rail buffs with a proclivity for adventure.

MAHARAJAS' EXPRESS

The Maharajas' Express is one such luxury service offering travellers the opportunity to visit the country's many iconic tourist hubs such as Delhi, Jaipur, Ranthambore, Fatehpur Sikri, Agra and Gwalior. This palatial locomotive has a capacity for 88 passengers and boasts elegantly appointed cabins furnished with decor inspired by royalty. Each suite is adorned with rich tapestries, fine linens, and embellished with an array of semi-precious stones and antiques. Guests can also take advantage of the many cabin features available on board such as flat screen LCDs with live television, internet access, and double beds. Packages available on The Maharajas' Express includes the eightday Indian Splendour tour, with highlights of the trip including a champagne breakfast at Taj Khema overlooking the Taj Mahal, a Tiger safari in the Ranthambore National Park, and a Royal Lunch in Udaipur in the country's western

state of Rajasthan. The service runs from October to April. For more information visit www.the-maharajas.com.

DECCAN ODYSSEY

Boasting 21 spacious coaches, The Deccan Odyssey is another amazing luxury service allowing travellers to see India by rail. Soaking up the history of the ancient country on the fly, the train's interior design reflects the various eras of the Deccan Sultanates. Two gourmet restaurants are located on board that maintain a continuous local flavour by serving up speciality dishes from every region the locomotive passes through. Socialising on The Deccan Odyssey is also easy, with an elegantly designed bar called The Gateway stocked up with plenty of premium spirits and snacks to help facilitate conversations with your fellow travellers. Adventures available on board include the Hidden Treasures of Gujarat: Mumbai to Mumbai package, an eight-day trip exploring the hidden gems of Gujarat the medieval capital of Vadodara, and the holy city of Nashik. For more information visit www.thedeccanodyssey.com.

GOLDEN CHARIOT

For those wanting a luxury rail service with a slightly more up-tempo twist, the Golden Chariot combines the appeal of premium travel with a blend of thrilling experiences across the southwest Indian state of Karnataka. The state is famed for its rich cultural history, architecture, and warm sunny beaches. Itineraries on the Golden Chariot takes passengers on nature walks in Bengaluru, a jaunt on board a boat riding the Kabini River, cultural dancing classes, and sightseeing at the Pattadakal and Badami cave temples. For more information visit www.goldenchariot.org.

PALACE ON WHEELS

The Palace on Wheels is another highend rail service that is certainly true to its name, boasting fourteen beautifully appointed saloons, each offering four twin-bed chambers, attached baths, comfortable sofas, reading lights and large glass windows to take the fullest advantage of the amazing countryside rushing by outside. On board there is a comfortable bar and lounge area, as well as two separate restaurant cars, Maharaja and Maharani, that serve up delicious Indian and Rajasthani dishes , as well as continental and Chinese menu options. For those who are interested to enjoy the journey, the train starts from Safdarjung Railway Station in New Delhi every Wednesday night and travels for a weeklong journey through Rajasthan. Stops along the way include the iconic tourist sites of Jaipur, Ranthamore, Udaipur, Jaisalmer, Jodhpur and Agra. For more information visit rtdc.tourism.rajasthan. gov.in/Client/PalaceOnWheel.aspx

Cruise through the bustle

India is globally renowned for its amazing land tours, lively urban throngs, and breathtaking scenery, however much of the country's beauty also resides in its many amazing river systems which are accessible by river cruise. Exploring India through the prism of a river sailing allows passengers the opportunity to admire the diverse flora and fauna that call the riverbanks home, as well as take in the landscape at a leisurely pace.

The chain of lagoons and lakes known as the Kerala backwaters in southern India is one such popular destination for river cruising. The picturesque maze of water stretches over a large area and contains within its coconut palm-flanked riverbanks are a number of popular tourist destinations such as the cities of Alappuzha, Kollam, Kasargod, Kozikode, Kumarakom, Kuttanad and Thiruvananthpuram. Cruising these tranquil waters is typically serviced by a Kerala houseboat – referred to by locals as kettuvallams. These unique ships form an integral part of the cruise journey and are constructed from a combination of bamboo poles, coconut fibre, ropes, and bamboo mats. Day tours in the Kerala backwaters are operated by either the State Tourism Department or privatelyowned tour operators.

The Brahmaputra river located in Northern India flows down from the Himalayas through the scenic Assam Valley, home to many national parks and remote rural communities. Sights to see along the way include amazing wildlife such as river dolphins and birds of prey, explorations of tea estates, and treks through the Kaziranga National Park where travellers can try their best to spot the elusive Indian rhinoceros and Indian tiger. Rural Indian culture is also on display when sailing The Brahmaputra river.

The Ganges is one of the most sacred rivers in Hindu culture and has been the subject of an increasing push by private cruise ship operators in the last five years. Cruise trips on the Ganges provide the ideal way to maintain a serene pace through some of the busiest hubs in India. Popular stops along the way include Murshidabad district of West Bengal, where passengers can disembark to see gold and silversmith workshops, sample tea in a local's home, and watch artisans undertake some traditional saree weaving.

Incredible India





Visa

River rafting, Rishikesh

For more information contact India Tourism Singapore Phone: +65 6235 3800 Email: info@indiatourism.com.sg Website: www.incredibleindia.org

EDUCATION AND EMPLOYMENT OVERVIEW

Lifelong learning is vital for those who want to succeed in the industry. Hear how education and employment has been in 2018.

AFTA EMIRATES TRAVEL CONSULTANT SCHOLARSHIP

EMIRATES CONTINUES TO BE A STRONG INDUSTRY SUPPORTER, DEMONSTRATING THEIR COMMITMENT THROUGH THE SPONSORSHIP OF THE 2018 NATIONAL TRAVEL INDUSTRY AWARDS AND THE EMIRATES TRAVEL CONSULTANT SCHOLARSHIP.

The scholarship provides travel consultants with less than 3 years' industry experience the opportunity to pursue personal excellence and further their career by undertaking recognised studies.

In 2018 the Emirates Scholarship was awarded to Rachel Husoy Cleary who received up to \$10,000 towards a related education course and a business class trip for two to Dubai to meet key leaders at Emirates, including a five-night itinerary to experience the destination of Dubai.

"Emirates remains dedicated to its travel trade partners and giving back to the industry each year continues to be more rewarding than the last. This scholarship allows our up-and-coming travel agents the opportunity to build their careers as they expand their educational horizons.

Over the past six years, Emirates has worked closely with travel agents to ensure that they are learning the skills they need to succeed and it's through this incredible opportunity, we are able to nurture our young talent and support the growth of the travel trade industry in Australia. We congratulate Rachel for her distinguished efforts and wish her all the best in her career," said Barry Brown, Divisional President Australasia, Emirates.

Emirates Scholarship Winner 2018 – Rachel Husoy Cleary

It was a true honour to be awarded the 2018 National Travel Industry Awards Emirates Travel Consultant Scholarship.

I have had an incredibly rewarding career working in some of Australia's best resorts including eight years with the Thredbo Sales and Marketing team and seven years on Hamilton Island including being part of the opening management team of the very luxurious qualia on Hamilton Island.

After taking time out from my career to raise my beautiful daughters and enabling them to follow their dreams it was time for me to re-evaluate what I wanted my next career to be and where I felt I could use my skills and experience to make a difference in people's lives.

I decided to chase my dream of combining my love of travel with helping others make their dreams come true. What better way than as a travel advisor?

My experience working in high end



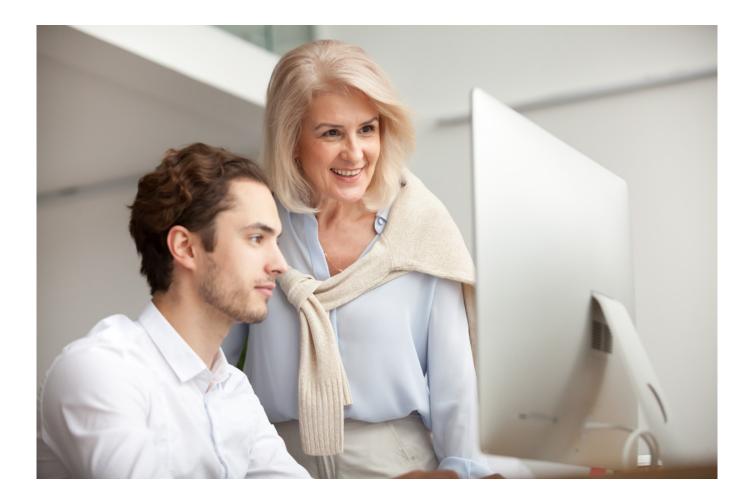
resorts where service is everything prepared me for the travel industry and how I can make my client's travel experiences extraordinary.

Winning the Emirates Travel Consultant Scholarship gave me the confidence to go out on my own and join MTA. This is something I couldn't have imagined only six months ago. It has been a wonderful journey so far with so many rewards.

I recently returned from visiting Dubai as a guest of Emirates where I spent two days at their headquarters meeting the senior management team and visiting each department from recruitment and induction training to the incredibly slick catering division as well as the various sales and marketing teams. To say I am impressed is a huge understatement. I was made to feel welcome by everyone I met and I learned so much about how airlines work. I also had the opportunity to explore Dubai and discover what a sensational, vibrant and modern city it is. My clients are already benefitting from my newfound knowledge.

The scholarship has allowed me to broaden my skills set in travel and will continue to do so as I believe in constantly learning.

This award has changed my life and I am incredibly grateful for the opportunities it is providing for me.



AFTA EDUCATION & TRAINING

Rick Myatt, Director, AFTA Education and Training

2018 MARKS A MONUMENTAL YEAR FOR TRAVEL INDUSTRY TRAINING, WITH A NUMBER OF INITIATIVES BECOMING A REALITY AFTER YEARS OF TIRELESS EFFORTS.

The first initiative which has become a reality is the approval of the three remaining skills sets or modules (out of four total) by the Government as per the proposal made by AFTA Education and Training on behalf of the Australian travel industry. This was achieved by a systematic and complex process of engagement and validation led by AFTA through the works of the Travel Industry Technical Advisory Committee, Skills IQ and Industry Reference Committee. The skills sets were finally approved by the Australian Industry Skills Committee, a federal government body overseeing skills.

SITSS00063 Australian & International Travel Products, SITSS00064 Australian & International Travel Destinations, & SITSS00065 Travel Sales & Customer Service are now all approved for delivery by registered training organisations (particularly AFTA Accredited Training 66 Learners can now choose to acquire what they need to know by studying individual modules??

Providers). They can be studied individually or collectively under the SIT 30216 Certificate III in Travel qualification course. This means that learners can now choose to acquire what they need to know by studying individual modules, instead of a full qualification. Please refer to www.training.gov.au.

The reason that motivated AFTA E&T to modularize the Certificate III in Travel qualification into four key skills sets came from the demand created by a current travel industry workforce through the membership criteria of ATAS – AFTA Travel Accreditation Scheme. To gain ATAS membership, 50% of the travel selling staff of an applicant need to hold a Certificate III in Travel and above. Now an existing workforce member from an agency can top up his/her knowledge & skills by studying only the necessary

66Now an existing workforce member from an agency can top up his/her knowledge & skills by studying only the necessary modules/ skills sets?? modules/skills sets. Along with gaining recognition for their prior learning (RPL) they can turn this into a full qualification (of Cert III in Travel) that meets with ATAS compliance. The same can also apply for those who have changed career from other industries that cross over with travel, who may have different types of skills but need to acquire our industry specialist knowledge before entering into travel space.

AFTA Education and Training is now advocating for a possibility of a funding support for learners from the governments as the above initiative clearly meets with State and Federal policies in improving capacity and capability of industry workforce.

TRAVEL TRAINEESHIP PROGRAM

A second exciting achievement this year was an introduction of the Travel Traineeship Program, a fantastic opportunity for our industry created by a collaboration of four parties, led by the Australian Travel Careers Council (ATCC), Hospitality Training Network, AFTA Education and Training, and AFTA Accredited Training Providers.

Under the NSW Government funded scheme, travel industry businesses can consider hosting eligible trainees for up to two years (or at the completion of their course) during their traineeship period to study Certificate III in Travel or Certificate IV in Travel & Tourism courses. Learners study online in their own time, while performing work duties at the same time.

Trainees are employed by HTN (a group training organisation) and before they are placed with their prospective industry hosts they are required to do four weeks of mandatory "induction process", an intensive preparatory course. After they successfully join host companies, they continue studying online while working to achieve their certification under AFTA Education and Training's strict training guidelines throughout their traineeship journey until completion.

AFTA Education and Training is continually seeking opportunities to lift industry skills training and development either organically or through partnerships with like-minded organisations.

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JOBS AND SKILLS

The travel industry remains a significant employer and contributor to the Australian economy with tens of thousands of people employed across a range of service areas.

According to AFTA there are some 20,000 travel agents within Australia alone. Yet despite widespread reports of a buoyant year of sales for retailers and wholesalers, 2018 has not been without its challenges for the industry particularly around its labour force.

Labour and skills shortages, churning of workers away from the travel industry and low wages have all been cited as symptoms of a challenging environment the past 12 months and whilst there are no real assurances that this will change in the immediate future, many experts feel optimistic about the year ahead.

Unanimity exists among several of the

larger recruitment firms servicing the travel industry in their collective belief of a shortage of "experienced candidates" which is subsequently leaving many jobs unfulfilled.

According to Adriana D'Angelis Managing Director for AA Appointments, the most notable shortage was for "experienced, highly trained travel consultants across the board including wholesale, retail and corporate."

A similar perspective is offered by Sarah Johnson, Managing Director Asia-Pacific for Travel Trade Recruitment, who says the pain point for retailers "is the shortage of qualified travel agents in the market to **66**This labour shortage in travel retailing appears to be forcing some employers to look beyond the travel industry for recruitment solutions in a bid to fill vacant jobs**?**

FROM THE PROS:

JOBS IN DEMAND	SKILLS IN DEMAND	employers to "continuously analys
 Retail travel consultants Corporate travel consultants Business development managers Cruise specialists Executive level / C Suite 	 Native GDS Multilingual skills Self-ticketing Content writing Social media marketing 	and benchmark to ensure employed don't lose young talent purely from financial perspective." All four are in agreement that there an abundance of opportunity within travel industry and whilst remunerati

work in front line retail travel."

This labour shortage in travel retailing appears to be forcing some employers to look beyond the travel industry for recruitment solutions in a bid to fill vacant jobs.

John Terry, Global Managing Director for TMS Talent Group, observed that employers who look outside of the travel industry for workers tend to find candidates possessing "new skills which also brings a new perspective into a company."

Employers are also keen to ensure that their workforce remain with them by offering flexible work environments to suit the changing nature of employee expectations.

To John Terry this includes among the many possibilities the capacity to "work remotely" with greater "flexibility" while for Sarah Johnson it's a "contemporary management style, company culture and equality in the workplace" which is the glue to keeping employees committed.

Remuneration continues to play a

determining factor on workers seeking a living from the travel industry with experts concerned that increases in wages are not keeping pace with inflation and that the 'perks' of the industry may not be enough to attract or retain workers.

In some instances, other industries are tempting employees within the travel industry away with more lucrative employment conditions.

Maxine Wiggs, Director at Resource Hub, suggests "we are losing great talent faster than we can replace it. There's been an exodus to other industries over the last few years as travel perks have dried up and salaries have stagnated."

A similar point is made by Adriana D'Angelis who says "new staff coming into the industry is declining. The benefits that used to attract them, such as educationals and cheaper travel, are no longer as common and the starting salaries are much lower than other sectors."

John Terry believes that "salary levels still continue to be an

obstacle when attracting new talent," whilst Sarah Johnson urges S а

is the on may not be the highest, the lifestyle, occasional perks and variety of work possibilities is second to none.

Fittingly, Maxine Wiggs urges to "bring back the travel perks, bring back the sense of adventure and fun, and the talent will return "

6There is an abundance of opportunity within the travel industry and whilst remuneration may not be the highest, the lifestyle, occasional perks and variety of work possibilities is second to none??

Findings from 2018 Travel Daily & travelBulletin Travel Industry Salary & Employment Survey

The 2018 survey of 1,300 people working in retail, wholesale, aviation, corporate, cruise, MICE and travel technology companies across both rural and metropolitan areas of Australia revealed that on average, workers have lost ground amid stagnant pay rates nationally, with almost half missing out on a pay rise in the past year and average incomes slipping slightly compared to the prior year.

The 2018 survey included a comparison of incomes between different agency groups for the first time, which confirmed that Flight Centre staff remuneration is skewed more towards bonuses - with lower base

salaries but significant potential for high achievers to earn more. But on average, there was little difference between

agency groups when base salaries and bonuses were combined, the research report found.

AT A GLANCE:

BROADER	TRAVEL
LABOUR MARKET	INDUSTRY
Average weekly earnings = \$1,586	Average weekly earnings = \$1,207
Percentage of full	Percentage of full
time employment = 60%	time employment = 90%
Composition of workforce	Composition of workforce
= 49% male, 51% female	= 27% male, 73% female
Change in earnings	Change in earnings
from prior year = +2.6%	from prior year = -4%

AVIATION OVERVIEW

With more and more passengers taking to the skies, find out what went down in 2018 in aviation.



AIR CONNECTIVITY TAKES OFF

During 2018 Australian airports have become even more connected to the rest of the globe, with new routes and increased frequencies feeding the ongoing demand for travel in and out of the country.

Probably the biggest route launch during the year was the Qantas non-stop service between Perth and London, with the airline's 787-9 aircraft for the first time ever removing the "hop" from the long-standing Kangaroo Route. That also saw a significant change in the QF longhaul network and its relationship with Emirates, with Qantas pulling out of Dubai in favour of boosting capacity to Singapore.

New aircraft such as the Boeing Dreamliner and Airbus' A350-XWB have given airlines a host of new possibilities, able to fly long, narrow routes to link new city pairs at commercially viable prices. As at September 2018 a total of 57 international airlines operated scheduled passenger services to and from Australia, carrying a total of just over 41 million travellers during the 12 months to 30 September - a year-on-year increase of

••New aircraft such as the Boeing Dreamliner and Airbus' A350-XWB have given airlines a host of new possibilities, able to fly long, narrow routes to link new city pairs...?? 5.1%. New routes announced during the year included non-stop United Airlines services between Melbourne and San Francisco, operating head-to-head with Qantas. Melbourne also benefited from a new non-stop Air Canada connection to Vancouver, while Chinese carriers also continued to boost links to Australia including a new direct flight to Darwin from Donghai. Virgin Australia expanded its connections with airlines owned by its major shareholder HNA Group by adding Sydney-Hong Kong to its network, sparking a price war on the HKG route which has also seen QF deploy 787s to the Chinese gateway.

Air New Zealand expanded its "Better way to Fly" campaign with the launch of non-stop services from Auckland to Chicago - its fifth US gateway alongside Los Angeles, San Francisco, Honolulu and Houston, bolstering the Air NZ Americas network which also includes Vancouver and Buenos Aires. The last 12 months also saw the final break-up of the longstanding relationship between Virgin Australia and Air NZ, which declined to renew the airlines' trans-Tasman alliance. Instead Air New Zealand announced a new "domestic partnership" with Virgin's arch-rival Qantas where the carriers are now codesharing on each other's respective domestic networks - but not on the Tasman which sees Virgin and Air NZ now competing head-to-head. Looking forward to 2019 there are

66 Melbourne also benefited from a new non-stop Air Canada connection to Vancouver, while Chinese carriers also continued to boost links to Australia...??

persistent rumours about Turkish Airlines becoming an online carrier, with 40 787-9 aircraft set to join the Star Alliance member's fleet which would allow it to operate non-stop from Istanbul to Sydney and Melbourne. Qatar Airways is also understood to be keen to further boost its Australian network by adding Brisbane flights - currently constrained by restrictions in the bilateral aviation agreement between Australia and Qatar. The success of QF's non-stop Perth-London flights is also likely to see Qantas expand its direct route network into Europe, which could see the return of QF metal to destinations such as Paris or Frankfurt. Qantas' "Project Sunrise" has a slightly longer time horizon, with QF CEO Alan Joyce pushing Airbus and Boeing to produce ultra-long-range aircraft that would allow non-stop services from Sydney to New York by 2022.

FROM IATA

Matteo Zanarini, Area Manager South West Pacific, International Air Transport Association

THERE IS NOW A NEW GENERATION OF IATA SETTLEMENT SYSTEMS & TRANSPARENCY IN PAYMENTS IN AUSTRALIA.

It has been a long road since IATA introduced the Billing Settlement Plan (BSP) in Australia during the 1970s. We had the IATA neutral paper ticket and then in 1983 the system was further automated with a magnetic stripe on the back that allowed the ticket information to be stored electronically on the ticket itself. This enabled the ticket to be used as a boarding pass as well.

The BSP is a system that has been designed to facilitate and simplify the selling, reporting and remitting of travel agents' airline sales under a single IATA Accreditation, which is governed by the IATA Resolutions and sales agency rules. These which regulate the relationship between IATA accredited agents and member airlines.

Travel agents in Australia in 2018 joined a progressive global transition to a new IATA accreditation system that will empower travel agents and airlines to embrace not only the challenges of an ever-changing business environment in travel retailing, but also change the way we settle financial transactions through the BSP.

On 19 November 2018 all IATA accredited agents and all BSP participating airlines transitioned from the existing IATA Resolution 818g to Resolution 812.

Resolution 812 comprises the NewGen ISS Passenger Agency rules, including provisions related to the introduction of new agency accreditation – no longer a one size fits all model but three models (GoLite, GoStandard and GoGlobal) of accreditation programs – as well as the Remittance Holding Capacity (RHC), an enhanced risk management framework.

Simultaneously to the roll-out of NewGen ISS, IATA also introduced Transparency in Payments (TIP) which is an industry initiative focused on providing airlines with increased



transparency and control in the collection of payments for their sales through the agency channel. At the same time, it will enable agents to take advantage of new forms of payment for the remittance of customer funds through the BSP. TIP will allow:

- Providers of Alternative Transfer Methods (ATM's) wishing to participate in agency direct remittances to airlines of BSP sales to enlist with IATA, and provide relevant information about their payment
- Participating airlines to be able to define in BSPlink their consent policy to the ATMs enrolled with IATA
- IATA Accredited Agents to be able to consult in BSPlink the list of enrolled ATMs for which airlines have provided their consent

ATMs include physical cards, virtual cards and/or account numbers issued in the name of the IATA accredited agent, any person permitted to act on behalf of the IATA accredited agent, or one of the IATA accredited agent's contracted suppliers. You may ask; how are TIP and NewGen ISS related? The implementation of TIP is aligned with and is occurring in conjunction with IATA's NewGen ISS program to allow for the modernization of the IATA BSP that aims to deliver faster, safer and more cost effective and relevant financial settlement services and solutions to airlines and travel agents that rely on the IATA BSP.

Our journey in communicating changes to the existing accreditation model commenced as far back as 2016, and in 2018 we ramped up our efforts. We would like to take this opportunity to thank IATA accredited agents and the travel agency community at large for their cooperation, understanding and valuable input throughout the transition process which resulted in a seamless and timely transition to the new accreditation program.

Should you require more information on NewGen ISS and TIP, please consult the IATA website at newgeniss.iata.org/travelagents or contact the IATA Sydney office on 02 9249 6866.

FROM QANTAS

Igor Kwiatkowski, Executive Manager Sales and Distribution, Qantas

IT'S BEEN A BIG YEAR FOR US AT QANTAS AND FOR THE ENTIRE AVIATION INDUSTRY AS A WHOLE. ALTHOUGH THAT'S NOTHING NEW FOR ANY OF US.

What is new is the pace and growth rates we're experiencing. According to IATA's 20 year air passenger forecast, in the past year alone, over 4 billion passengers took flight and by 2037 it is expected to double to 8 billion. A lot of that growth is predicted to come from routes in our own backyard with an extra 2.35 billion passengers expected to travel across Asia Pacific. So with those numbers, more than ever before, airlines need to adapt and to unlock new technologies and respond to evolving customer preferences.

For almost a century, Qantas has been motivated to be one hop ahead. Responding to what customers truly want is at the heart of all the decisions we make. And we're constantly working to build on our track record as innovators and early adopters.

This year we connected the last two 'disconnected' continents on the planet. Our direct Boeing 787-9 *Dreamliner* flights between Perth and London took flight in March and have been experiencing seat factors above 90 per cent. There's no shortage of interest.

And now our customers on the east coast of Australia want direct flights, too. So through 'Project Sunrise' we're making it happen. Our goal is to make flights from Sydney and Melbourne to London and New York a reality by 2022. We are now confident that Boeing and Airbus have an aircraft that can make the distance with a full payload. We're working with each manufacturer on the detail.

We know customers expect a comfortable and enjoyable experience with Qantas both in the air and on the ground, so we're upgrading our lounges, and rolling out fast, free Wi-Fi



66Our trade partnerships have been a hugely important part of our 98-year history, and this year we've been busy improving the way we work with agents...?

on domestic flights to help them stay connected.

We're finalising the detailed design work on a major cabin upgrade for our A380s and upgrading our turboprops which fly on regional routes.

We're also evolving the way we work

with our trade partners. This year we launched our Qantas Distribution Platform and are already leading the region in utilising IATA's New Distribution Capability.

Our trade partnerships have been a hugely important part of our 98-year history, and this year we've been busy improving the way we work with agents through introducing Qantas Agency Connect and online servicing tools, which will keep getting better and better.

A great number of our loyal customers choose to fly Qantas because of the relationship they have with their travel agents and corporate travel managers. AFTA is a big part of that.

2019 is set to be another big year for aviation and we're glad to have you onboard. Thanks to all of you for your continued support in the leadup to our centenary and beyond.

American Airlines

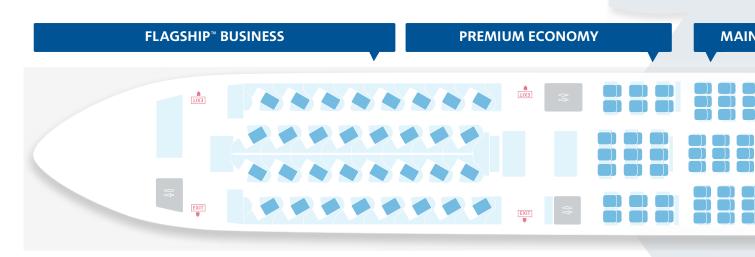
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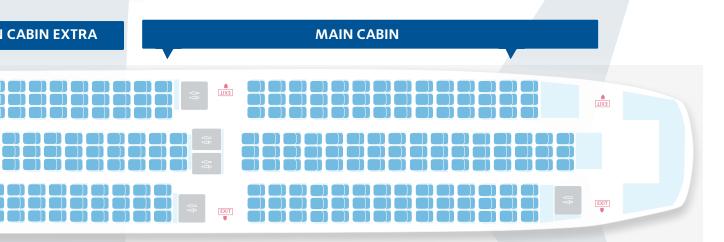


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erved.

CRUISING OVERVIEW

Discover what 2018 has been like for the cruise industry in Australia

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LIFE SIGNS REMAIN STRONG FOR CRUISING

The outlook for the Australian cruise sector in 2019 remains bright despite the challenges presented by ongoing capacity constraints.

The latest figures from Cruise Lines International Association (CLIA) Australasia reveal that the Australian cruise market grew by 4.4% in 2017, meaning that close to 6% of the Australian population hopped on board a cruise in that year. The figures represent the strongest market penetration in the world and lend further weight to the argument that Aussies continue to be enamoured with the notion of cruising.

The Australian cruise sector also continues to deliver significant financial returns, injecting more than \$5 billion annually into the economy and supporting an estimated 21,000 full time jobs. The trend in terms of destinations show that Aussies continue to flock towards local waters, with the South Pacific region receiving most of the attention - notching up approximately 471,000 Australian passengers a year. Cruises out of Australian ports show the divide between domestic and international inbound cruise passengers stands at an 80%-20% split, with the latter viewed as a major future growth opportunity.

Although the growth trajectory of Australian cruising has slowed in recent times, this has not stopped several cruise lines from committing further capacity to the Australian market in 2019 and beyond.

Earlier in the year Princess Cruises announced it will embark on its largest ever Australian and New Zealand deployment in 2019/20, with five ships to homeport out of six cities. The deployment will see over 125 departures offered across Sydney, Perth (Fremantle), Adelaide, Melbourne, Brisbane and Auckland. The cruise line will base two of its four newer ships, *Ruby Princess* and *Majestic Princess*, in Sydney - representing a 25% increase in capacity on the previous 2018/19 season.

66Although the growth trajectory of Australian cruising has slowed in recent times, this has not stopped several cruise lines from committing further capacity?? Carnival Cruise Line is another player committing more resources to Australia, revealing it will homport its largest ship *Carnival Splendor* in Sydney from December 2019. The arrival of the 3,012-passenger vessel represents a 66% boost in capacity for Carnival in Australia and will sail year-round.

Outside of existing players, Australia has also attracted the gaze of a new international cruise line with news in September revealing that Dream Cruises will operate voyages in Australia for the first time in 2019/20. The Hong Kongbased cruise line unveiled 21 seven-day Australasia journeys on board a newly refurbished *Explorer Dream*. Catering for Asian-sourced passengers, the local deployment will include six Barrier Reef voyages, as well as eight Tasmania and Melbourne cruises calling at Port Arthur, Hobart, Burnie, Melbourne, Philip Island and Eden.



FROM CLIA

Joel Katz, Managing Director, Cruise Lines International Association Australia & Asia

CRUISING TOWARDS A GREENER FUTURE.

As the world's largest cruise association, CLIA is composed of more than 60 of the world's major cruise lines and serves as a non-governmental consultative organisation to the International Maritime Organization, an agency of the United Nations.

CLIA's mission is to promote policies and practices that foster a safe, secure and healthy cruise ship environment; educate and train its more than 25,000 travel agent members; and promote and explain the value, desirability and affordability of a cruise holiday.

The growth story of the cruise industry is well known. In 2008, the industry carried 16.3 million passengers globally, and in 2018 we were at the 28 million mark. We expect the growth to continue and forecast a figure of 40 million passengers by 2030.

As cruise continues to grow, so too does its contribution to global economies. Worldwide, the industry's total output year is US\$126bn, supporting over 1 million full time jobs globally.

So, with over 250 ocean-going cruise ships now and an extra 109 on order, we are highly motivated to ensure our growth is sustainable.

At a practical level, we need to have appropriate port infrastructure that can accommodate the ships. Getting the right infrastructure remains a challenge in many areas across the region.

We need to make sure that we have a diverse and growing range of attractive and interesting destinations to visit. Without beautiful, sustainable destinations we don't have an industry. We're in the middle of a global travel gold rush, with the result that some of the world's most popular destinations are experiencing crowding issues. Economic benefits alone do not make strong communities, and destinations need to remain a great place to live. Our approach



66Our industry is actively planning for growth, but we know we can't take it for granted??

is to partner with local stakeholders to address concerns and collaborate on long-term planning.

It is also a business imperative for our industry to operate sustainably at sea and this is a significant area of focus.

Our industry is highly regulated and we comply with IMO, flag state and port state requirements. While cruise ships make up less than 1% of the more than 50,000 ships in the global shipping fleet, the industry is nevertheless being proactive in how it can continually improve its environmental impact.

On air emissions, we are innovating and investing in emission-reducing technologies, such as LNG, shore-power capability and deploying advanced exhaust gas cleaning systems that reduce sulphur oxides in ship exhaust.

CLIA cruise lines never discharge untreated waste water at sea, and use advanced water treatment systems that exceed international requirements.

Some cruise ships recycle or repurpose 100% of the waste generated on-board, and on average cruise ships recycle 60% more waste than the average person recycles on shore each day.

Our industry is actively planning for growth, but we know we can't take it for granted, and the industry is focused on healthy and sustainable development. Cruise ships aren't cheap and there is every motivation to get sustainability right. The fact that so much investment is being put into ensuring that the fleet is taking advantage of the latest technologies, together with the ambitious emissions reduction targets the industry is setting itself, demonstrates our industry's commitment to prioritising environmental sustainability.



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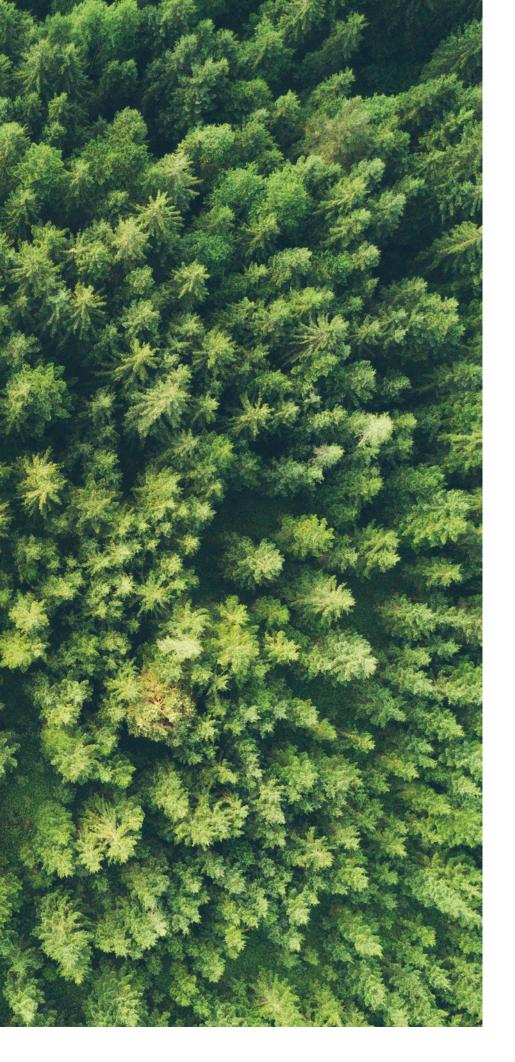
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TRENDS: SHAPING SUSTAINABLE TRAVEL

In a world where climate change and "going green" are becoming more than just buzz words, how can tourism operators ensure they leave less of a mark, and more of a sustainable imprint on the planet? That is the burning question and in 2018 we have seen many tourism organisations focus their efforts on answering it.



Australians love to travel. According to the Australian Bureau of Statistics, Australian residents undertook 9,118,000 outbound international trips throughout 2017, with 5,115,000 of those trips for "holidaying purposes". But how many of these travellers were aware of the impact their travels were having on the planet – and what can be done to educate the masses?

"With the number of people travelling expected to increase by 1.8 billion by the year 2030, we can either destroy travel and the world through it, or we can make our travel sustainable so that we can continue to travel," said Neil Rodgers, Managing Director of Adventure World Travel. "Travel and tourism has the potential to make the world a better place by bringing economic benefits to poorer destinations through cultural exchange and understanding, and through self-growth."

WHAT DOES IT MEAN TO HAVE A SUSTAINABLE BUSINESS?

The concept of sustainability is more than just ensuring a business recycles, or offsets its carbon footprint. Essentially, the term covers three specific pillars – economic, social and environmental. A business can be considered to be working in the sustainable space if it works towards the goal of ensuring economic benefit of the communities involved, that local wildlife and endangered species are protected, and that the environment isn't harmed by the travel experience in any way.

WORLD EXPEDITIONS

"Tourism is one of the world's most powerful economic drivers – how we choose to allocate our travel spend can have far reaching consequences beyond our personal experiences, with the power to make important differences in the lives of others," said Donna Lawrence, Responsible Travel Manager for World Expeditions. "Responsible tourism is all about supporting the local shop owner, restaurant and home-stay people."

Operating since 1975, World Expeditions places strong emphasis on creating a travel experience that alleviates pressure to the planet. The company's sustainable travel practices and commitment to supporting local communities at every level continues to underpin the way they create their innovative travel itineraries. Offering a range of experiences that include the expertise of local staff, carbon offset options and a genuine approach to "thoughtful travel", it continues to attract travellers seeking to learn more about how behaviour impacts the people and places we visit. "With knowledge, comes the opportunity to do the right thing," Lawrence affirms.

INTREPID TRAVEL

Echoing the sentiment of World Expeditions, Chief Purpose Officer at Intrepid Travel Leigh Barnes strongly believes the key to sustainable travel lies in relying strongly on the locals. "A major project we have been working on is community-based tourism. This is where we work with a local community to help develop a tourism project that helps their community from a financial standpoint and gives them a revenue stream," he said. "As a traveller, anything that injects money into the local community is a really sustainable option. By staying in locally owned hotels, and purchasing locally made products, not only will you have a better experience but you are helping people take control of their own destiny."

The Intrepid Group is a proudly B Corp certified company, meaning it has dedicated time to understanding its position and how it can "be better". "Having a framework in place helps us to see where we are at, and highlights where we can improve. By understanding where Right: The Intrepid Foundation is making its mark on sustainable tourism through supporting projects around the world such as the East African Wildlife Society who protect animals from poachers in Kenya.



our biggest impact is we can then start to make improvements," he said.

The Intrepid Foundation, formed in 2002, is another way the business is making its mark on sustainable travel. The not-for-profit organisation matches every dollar donated, before injecting 100% of the funds raised back into its series of current projects. "Sustainable travel is about taking responsibility for what you do while travelling, and being aware," said Barnes. "Think about how you could approach things differently, and take the time to research alternatives. Travel companies need to take more responsibility for what's happening to the environment, and educate customers on how they can make a change."

ADVENTURE WORLD

Managing Director for Adventure World, Neil Rodgers agrees that the travel industry has a responsibility to ensure customers are aware of the impact their travel is making. "Travel companies are the 'gatekeepers' of sustainable travel, and we have a responsibility to sell experiences properly," he said. "Where a destination might struggle, a client who selects an ethical travel company will certainly lessen this impact."

With a number of prominent destinations experiencing tourist desecration, including Venice, Barcelona and Iceland, it's more important than ever that tourist operator's focus on what they can do to preserve these for future generations. "Greater action needs to be taken to disperse the crowds of tourists in sensitive regions, and the tailor-made programs we offer at Adventure World are a great way for travellers to make less of an impact as there is not a mass group of forty or fifty travellers impacting a town or village at once," he said.

Education is also high on the Adventure World priority list, with the company dedicating its work to supporting agents in best practice. "Whether it's saving endangered species or supporting community development projects around the world, by sharing these inspirational stories and educating our agency networks on the positive impact that comes from travelling in a more mindful way, we are hoping to advance travel as a force for good."

Right: Iceland is one of the destinations experiencing tourist desecration and Adventure World is committed doing what it can to preserve it for future generations.



2019 SUSTAINABLE TRAVEL HOT SPOTS

According to Stewart Moore, CEO and founder of benchmarking and certification company EarthCheck, the shift in conscious travel is reflected by the fact that more travellers are seeking assurance that destinations are backed by a commitment to best practice environmental, social and cultural sustainability. "With millennials expected to account for 50% of travel spend by 2026, a generation of connected travellers has emerged and they are eager to embrace sustainable travel," he said.

Here are some key destinations tourists should be visiting in 2019:

KERALA, INDIA

Travellers are encouraged to visit the flood-devastated region, where tourism is needed to help it rebuild. "The floods caused major damage, and increasing tourism is a practical way to help its recovery," said Donna Lawrence, World Expeditions' Responsible Travel Manager.

NEPAL AND PERU

A number of World Expedition treks to Nepal are assisting travellers give back, including helping to rebuild classrooms following the 2015 earthquake. In Peru, travellers might find themselves helping to install a cook-stove in a remote area, which helps improve the health outcomes of locals by ensuring internal air is clean, Lawrence added.

THE AMAZON

Neil Rodgers from Adventure World Travel urges travellers to experience the beauty of the Amazon. "Often described as the 'lungs of our planet', the Amazon produces 20% of the earth's oxygen, and is home to thousands of plant, bird, mammal and aquatic species," he said. "Walking among a mosaic of ecosystems is the ultimate canopy tour."

BOTSWANA, AFRICA

Africa's "backcountry" offers the careful traveller an experience like no other. "A plethora of environmentally friendly resorts have sprouted up along the savannah, making it easy for travellers to revel in eco-fantasy stays," added Rodgers.

> Left: Visit the Amazon Rainforest on a sustainable trip to experience the 'lungs of the planet'.





GOVERNMENT INITIATIVES

The Australian Government supports a number of initiatives designed to make ecotourism and sustainability more accessible for Aussie tourism businesses.

ECOTOURISM AUSTRALIA (EA)

Founded in 1991, Ecotourism Australia is a not for profit member-based organisation focused on inspiring environmentally sustainable and culturally responsible tourism. As one of only six Global Sustainable Tourism Council accredited certification bodies worldwide, EA's ecotourism certification programs help to set the standard for Australian tourism operators.

"By recommending tourism operators who have achieved certification through Ecotourism Australia, an agent can rest assured that their customer will not only



have an experience which is richer – due to gaining an increased understanding of the nature and culture they interact with – but also one which has a positive impact on the planet and on the communities they visit," said Communications Manager for Ecotourism Australia, Lina Cronin.

EARTHCHECK

EarthCheck is the world's leading scientific benchmarking, certification and business advisory group for travel and tourism. Since 1987, they have helped businesses, communities and governments deliver clean, safe, prosperous and healthy destinations for travellers to visit, live, work and play by providing sustainability solutions to the international market place.

EarthCheck CEO and founder, Stewart Moore said the sheer size and reach of the tourism and travel sector now gives it a substantial voice. "In this era of on-line transparency and accountability, destinations are increasingly aware of their social and sustainable responsibilities," he said. "From corporate clients, to governments and environmentally aware guests, tourism brands are growing in sensitivity to best practice and the commercial impact of their sustainability commitments."

Destinations on the EarthCheck honour roll include Rottnest Island in WA, Phillip Island in Victoria, Kosciuszko Thredbo in NSW and the southern part of the Gold Coast in Queensland. "Importantly, one of the key outcomes of a sustainable destination is a strong resilient tourism industry with dynamic product and experience offerings that adapt to the needs of the conscious traveller and the community as the destination evolves," Moore added.



TECHNOLOGY TRANSFORMING INDUSTRY

There's no doubt that technology last year continued its relentless reshaping of the travel sector, which has time and again proven to be a leader in adopting the latest innovations.

2018 was no exception, with IATA's New Distribution Capability (NDC) one of the hot tech topics. NDC promises boundless new opportunities in terms of retailing air products, and airlines and technology providers have been scrambling to achieve IATA certification of their offerings as they position themselves to take advantage of the possibilities. The three major GDS firms have been leaders in developing their own NDC products, and initial fears that airlines would enforce direct connections with individual travel agents, displacing traditional GDS, have dissipated as the scale and scope of NDC has become more defined. GDS looks set to continue its key role in distribution, albeit aggregating fares and other content from an ever-wider variety of sources.

However some have sounded caution about the hype around NDC, noting that it is extremely unlikely that new platforms will be able to quickly replace 66NDC promises boundless new opportunities in terms of retailing air products, and airlines and technology providers have been scrambling to achieve IATA certification of their offerings as they position themselves to take advantage of the possibilities?

the robust features and search speeds offered by the current GDS. An intriguing development towards the end of the year was Sabre's acquisition of Farelogix for US\$360 million - essentially taking over what in its early days was touted as a key rival. Farelogix was founded in the mid-2000s as one of the so-called GDS New Entrant companies, but in more recent years had been a leader in NDC, developing a key tool to help airlines implement the new platform.

Technology was a key focus for the major listed travel agency groups, with Flight Centre and Helloworld both making key tech acquisitions during the year. Helloworld bought Flight Systems Pty Ltd, the company behind the Skiddoo online travel agency, with HLO CEO Andrew Burnes saying the deal provided the company with a low-risk and low-cost entry to some "sophisticated distribution technologies to incorporate into the rapidly developing ResWorld agency platform". Flight Centre's tech moves included the acquisition of Torontobased Umapped, which offers an itinerary builder and platform to consolidate bookings, curated content and real-time location data into a single interface.

The last 12 months have also seen the ongoing technological evolution of payment systems, with an increasing adoption of the AFTA Chargeback Scheme (ACS) seeing participating agents switch their providers to those who are partners with the program. ACS, which is only available to ATAS accredited agencies, provides protection against consumer debit and credit card chargebacks resulting from supplier insolvency, enabling coverage of "Forward Delivery Risk" which has not traditionally been covered by insurance providers. Implementation of ACS sees agents join one of the approved Payment Partners such as Wirecard and Mint Payments, which offer a range of supplementary services alongside processing of payments such as integration with mid office systems, fraud detection and prevention solutions and more. During the year Express Travel Group embraced ACS with the release of its own in-house Express Pay platform developed in conjunction with the

National Australia Bank and Fat Zebra. In terms of technology trends for 2019, it seems that automatic itinerary generation is on the agenda of a number of providers, such as eRoam - an Australian platform which uses artificial intelligence to automatically provide specific recommendations to travellers. eRoam utilises crowd-sourced current passenger data and activity to offer peer-to-peer suggestions that are available for instant booking. The ability to automatically research and build itineraries - in the case of agency groups from content sourced via preferred suppliers - has the potential to transform the life of travel agents who will continue to evolve more and more into trusted travel advisors rather than simply fulfilling transactions.

66 The last 12 months have also seen the ongoing technological evolution of payment systems, with an increasing adoption of the AFTA Chargeback Scheme (ACS) seeing participating agents switch their providers to those who are partners with the program??

Left: eRoam uses crowd-sourced passenger data and activity to offer peer-topeer itinerary suggestions.

Right: New payment solutions have seen agents switch to providers who are partners of the AFTA Chargeback Scheme







CORPORATE TRAVEL IN FOCUS

The last year has seen a major shift in the global corporate travel landscape, with the acquisition of HRG Worldwide by American Express Global Business Travel.

The last year has seen a major shift in the global corporate travel landscape, with the acquisition of HRG Worldwide by American Express Global Business Travel. The shake-up was the latest step in a wave of industry consolidation which some pundits predict will be driven by the ongoing technology revolution. The big have gotten bigger, with the complementary geographies covered by the businesses expected to "improve the global scale and reach" of the corporate travel behemoth. HRG CEO David Radcliffe now a member of the American Express GBT Board, while the deal saw the departure of HRG Australia MD David Lorimer and the appointment of Rob Dell as Amex GBT's new Head of Government and Enterprise Sales.

That was just one of the big developments in the corporate travel sector in 2018, which also saw New Zealand business travel technology developer Serko Limited gain significant traction with its new Zeno platform. Used by a host of key clients, Serko saw a significant bump in its share price when it announced the signing of a letter of intent with Flight Centre Travel Group covering its corporate operations in Australia, New Zealand, Asia, the USA, Canada and Mexico. Flight Centre is providing an "ongoing development contribution" to **66**Used by a host of key clients, Serko saw a significant bump in its share price when it announced the signing of a letter of intent with Flight Centre...**?**

Serko which has since seen it announce its own unique version of the Zeno product.

Helloworld Travel's corporate business saw a changing of the guard with the abrupt departure of Russell Carstensen in May 2018. Carstensen had been HLO's Group General Manager of Corporate and Air Tickets since 2012 following an extensive career with the business in its various previous incarnations, with key achievements including winning the Whole of Australian Government tender which has seen QBT manage the official travel of hundreds of Commonwealth entities. His shock resignation saw **QBT** Group General Manager Nick Sutherland take over responsibility for the company's corporate businesses, while Group GM Retail & Commercial John Constable expanded his responsibilities to encompass the Air Tickets operation.

Corporate Travel Management was also in the headlines repeatedly during 2018. During the year CTM continued its relentless acquisition spree with the purchase of NSW-based South Coast Travel Group, which had previously been part of Magellan Travel member Platinum Travel Corporation. The \$5 million purchase of South Coast Travel also saw the company's founder Greg McCarthy appointed as Corporate Travel Management's CEO of Australia and New Zealand. Later in the year CTM also announced the acquisition of Hongbased Lotus Travel, with the deal making Corporate Travel Management Asia the biggest TMC in Hong Kong servicing Greater China.

The deals and ongoing strong performance in the business saw CTM's share price continue to soar to record levels. That created an opportunity for hedge fund VGI Partners, which established a significant "short" position in the company before releasing a damning report criticising Corporate Travel Management's accounting practices and a range of other concerns, including a proliferation of so-called "ghost" offices around the world. The company was forced to suspend trading in its shares, with CEO Jamie Pherous fronting analysts and media in the following days to comprehensively address the issues.

While acknowledging the need to keep the company's website updated with office locations, and not using the term "patented" in relation to CTM's proprietary technology, Pherous also comprehensively dismissed most of the VGI report, saying the company had fundamentally misunderstood how corporate travel businesses operate. VGI had made some of its criticisms based on comparisons of cash holdings and interest payments with so-called "peers" such as Flight Centre and Expedia, which Pherous noted had significantly different business models. VGI reportedly made tens of millions of dollars in profit by selling its CTD shareholding in the following days as the price slumped about 30%, however a subsequent response by the company saw the shares eventually stabilise.

66While acknowledging the need to keep the company's website updated with office loactions...Pherous also comprehensively dismissed most of the VGI report??

The path ahead

JO SULLY, VICE-PRESIDENT & REGIONAL GENERAL MANAGER, AMERICAN EXPRESS GLOBAL BUSINESS TRAVEL, AUSTRALIA & NEW ZEALAND, AND SOUTH-EAST ASIA

2018 has been a year of growth for GBT, particularly as a result of our acquisition of Hogg Robinson Group (HRG), which has allowed us to expand through complementary footprints and technology.

While still in its early stages, we're excited by the prospect that our combined assets will bring in terms of an accelerated focus on innovation, investing in the right technology platforms and improving the traveller experience.

While the TMC space has been historically slow to innovate, key advances to our duty of care offering and how we use AI, have also demonstrated our ability to keep pace with emerging technologies.

In our 2019 Hotel Monitor report, travel buyers indicated traveller security remains a key area of focus for next year. GBT's EXPERT CARE solution, which helps travellers navigate small and large-scale travel disruptions, has the ability to request and visualise a traveller's exact location via GPS.

We're also already using artificial intelligence in several areas, like making sense of hotel room and rate types as well as amenities within our core platform.

What's most interesting in the tech space is the accelerated speed by which data can be processed, and a focus for us in 2019 will be exploring how this can deliver exceptional traveler experiences and better program management for our clients.

Given consumer expectations for personalisation, the entire business travel industry is actively investigating how to use data to personalise and power better experiences. This is at the heart of GBT's strategy for launching technology in 2019 and beyond.

TRAVEL AGENTS

Hear what's new for some of the biggest travel agency groups in the industry.

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N.C.

ATAC

2018 HAS BEEN A VERY SIGNIFICANT YEAR FOR ATAC. IT HAS ENJOYED SUBSTANTIAL GROWTH IN THE NUMBER OF MEMBERS WITHIN THE PAST 12 MONTHS, AVERAGING 12% MEMBERSHIP GROWTH, AND INCREASED SUPPORT FROM OVER 40 PREFERRED SUPPLIERS.

Members have enjoyed increased revenue with eight payments having been made to them, ensuring we continue to put money back into their pockets. This has been made up of 4 air payments, EOFY and Calendar year overrides, an annual share divided and a super override on air target.

For the forth consecutive year the Group was a finalist in the NTIA Awards, in the Best Travel Agency Group – Non Branded category.

Major projects undertaken during 2018 included a brand refresh and introduction of the new relevant and forward-thinking tagline, "Partners in Your Prosperity." This reinforces how ATAC is adapting to the rapidly changing needs of the industry and the dedication to the success of members and partners. Ongoing support has been provided to members to grow their businesses through increased communication, regular incentives in partnership with preferred suppliers, workshops and the introduction of Human Resources tools and consulting for their members

A highlight of the year was the Group's conference in Singapore, the Future Focus 2018 Conference held over three days. Here, members and suppliers not only got to enjoy the highlights of Singapore but benefited from



insights from top presenters, hands-on workshops, inspiring keynote speakers and recognition of top achievers.

Plans for 2019 include technology enhancements to empower members with an integrated business portal to bring partners, members and resources together in one seamless solution. Future Focus Conference 2019 has been confirmed for 17-20 October in Brisbane.

CT PARTNERS

CT PARTNERS, AUSTRALIA'S LARGEST AND MOST INFLUENTIAL MEMBER OWNED TRAVEL BUYING NETWORK, HAS ENJOYED ANOTHER YEAR OF STRONG GROWTH AND SUCCESS WITH ANNUAL TURNOVER NOW TOPPING \$1.7 BILLION.

The network continues to enjoy very high levels of member engagement and collaboration thanks to its completely transparent model which drives 100% of supplier payments to members. The 2018 Annual Meeting was the most successful to date with 40 preferred supplier partners and 34 Members at the Mandarin Oriental in Bangkok.

66Continued growth is the ongoing focus for 2019 as well as further strengthening the close working relationships with supplier partners??



Continued growth is the ongoing focus for 2019 as well as further strengthening the close working relationships with supplier partners to deliver strong contractual results. CT Partners also continues to look at the incorporation of new technology and the ongoing expansion of the supplier base with particular emphasis on hotels and exclusive land arrangements.

EXPRESS TRAVEL GROUP

EXPRESS TRAVEL GROUP EXPERIENCED A YEAR OF STEADY GROWTH IN 2018 WITH POSITIVE RESULTS ACROSS ALL SEGMENTS.

With our continued focus in providing a fully integrated solution of travel services, 2018 has seen delivery of new initiatives designed to assist independent travel agencies of all sizes across Australia. We welcomed 33 new members into the Group, which now collectively numbers well over 700 members across our Select Travel Group, Independent Travel Group and italktravel franchise stores.

A focus on agency communication and service delivery has led to the

establishment of the Agency Support Centre internally, who also successfully developed and launched our new and improved Express Academy Learning Platform.

Express Travel Group is committed to accreditation and in providing the means necessary for members to promote expertise within their own business. Our exclusive Book Safe Agent suite of insurances incorporated the AFTA Chargeback Scheme (ACS) for 2018. This offering was further enhanced with the launch of Express Pay this year, an online merchant platform available also incorporating ACS.

As we look towards 2019, we are committed to simplifying further the way

Express Travel Group

our members interact and get rewarded within ETG. Our new Elevate rewards and recognition program coupled with new Express Incentives will be designed to do just that. Forecasted demand for travel looks optimistic for 2019 and with the development of new aircraft technology and new cruise ship builds we are looking forward to the opportunities and challenges that 2019 will bring and are committed to working with existing and new members in reaching their goals.

FLIGHT CENTRE

THE 2018 CALENDAR YEAR WAS AN EVENTFUL PERIOD FOR THE FLIGHT CENTRE TRAVEL GROUP IN AUSTRALIA.

Early in the year, we completed our largest ever system change when we deployed a new GDS.

This was followed by a fairly significant consolidation of our leisure brand stable, as part of our Rebrand and Grow strategy.

Further change took place late in the year, when our Flight Centre and Student Flights people voted overwhelmingly in favour of a new pay and conditions structure, which (assuming it is formally ratified) will be delivered via our inaugural enterprise bargaining agreement.

Financial results in Australia were below our expectations while these changes were being implemented, but the company overall delivered fairly strong results.

Our businesses in the Americas and Europe, the Middle East and Africa were key contributors and together generated earnings of more than \$150 million during the 2017/18 fiscal year. In addition, our Australian corporate business, which was less affected by the changes, also performed well.

From a people perspective, other significant developments included the introduction of a paid parental leave scheme, new workplace flexibility arrangements and the addition of Travel Partners, which has given us a much stronger network of home-based agents.

Looking ahead to 2019, we aim to grow globally across our three core business divisions of leisure travel, corporate travel and in-destination travel experiences. While our overseas businesses now

FLIGHT CENTRE

generate about half of our global sales, Australian remains far and away our largest individual business and we aim to build on our historic success in this market.

We are introducing new strategies, like FCB 2.0 – the transformation of Flight Centre Brand, strengthening our network and systems and working with our key partners to introduce new products and to help grow the overall travel market.

Overall, we expect further market growth in Australia, which creates opportunities for our businesses, our partners and our people. **WHO** can offer me a wide selection of international payment methods and guarantee secure, hassle-free payment processes for me and my customers?

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HELLOWORLD TRAVEL

HELLOWORLD TRAVEL HAS AGAIN ENJOYED A HIGHLY SUCCESSFUL 2018 WITH ACHIEVEMENTS INCLUDING NETWORK EXPANSION, MULTIPLE NTIA NOMINATIONS AND AWARDS ACROSS THE GROUP AND HIGHLY POSITIVE FEEDBACK FROM AGENTS.

They once again delivered a successful Owner Managers Conference, this time in Adelaide and the Helloworld Travel Frontliners Forum was hosted overseas for the first time in Fiji.

The business also greatly expanded their advertising and promotional activity entering into a travel industry first Platinum Partnership with News Corporation seeing activity across News Corp media assets greatly increase. They also launched an exciting new television show 'Helloworld' in partnership with Channel 9, delivering amazing results and terrific viewer numbers. This advertising and promotional activity has contributed to increased band recognition that they expect to continue into next year and beyond.

In 2019 Helloworld Travel will continue to focus on growth with more store openings planned in high traffic areas that will deliver great returns to franchisee networks.

The company will continue their commitment to deliver increased benefits to their agent networks with many initiatives planned to directly meet their needs and to contribute to their business success. Highlights that will be on offer in 2019 include: the continuation of expanded Training and

Development opportunities tailored specifically to HLO agents across a number of areas including leadership training, advance selling techniques and of course product training to ensure the network of travel professionals are always up to date. Expo activity will also be expanded across the group, as well as a focus on technology with their inhouse platform ResWorld being launched to the group as well as microsites and apps for agents. They will also continue their increased brand activity across advertising and promotions.

HELLOWORLD BUSINESS TRAVEL

2018 HAS BEEN A YEAR OF ACHIEVEMENT FOR HELLOWORLD BUSINESS TRAVEL, CAPPED OFF BY BEING AWARDED AUSTRALIA'S BEST NON-BRANDED TRAVEL AGENCY GROUP AT THE 2018 NTIA.

The HWBT network agents also experienced success at the NTIA with

multiple awards recognised across the group. They also expanded their

66They also expanded their unique value proposition for the network agents**99**



unique value proposition for the network agents with increased preferred partner offerings and specifically tailored technology solutions.

In 2019 they will continue their technology focus and will be expanding promotional activity for the Helloworld Business Travel network to maximise opportunities for members.

MAGELLAN

IN 2018, MAGELLAN TRAVEL CELEBRATED OUR 10 YEAR ANNIVERSARY SINCE THE FOUNDATION OF THE GROUP ON THE 1ST OF APRIL, 2008.

We used our 10th Annual Conference, which was held at the Hyatt Regency in Sydney, to reflect and pay tribute to the Group's founders, inaugural members and supplier partners who each made a significant commitment to the group and its future.

We are incredibly proud of all that has been achieved through the foundation of Magellan Travel all those years ago and now we enjoy embracing our next chapter for the group.

As of March 2018, Magellan Travel

became the 6th retail business within Helloworld Travel Limited. Nearing 12 months on, Helloworld Travel and Magellan have delivered to members all that was promised to come as a

⁶We are incredibly proud of all that has been achieved through the foundation of Magellan Travel all those years ago and we now enjoy embracing our next chapter⁹⁹

Magellan[®] TRAVEL GROUP

result of the acquisition. Under Helloworld ownership, the future for Magellan members is brighter than ever before.

2019 is set to be a fantastic year, we have our sights firmly focused on continuing to deliver additional support and benefits to our Magellan members and their clients and a fresh focus on our industry partnerships.

MTA - MOBILE TRAVEL AGENTS

CAPPING OFF ANOTHER STRONG YEAR FOR MTA – MOBILE TRAVEL AGENTS, THE COMPANY HAS SEEN TRAVEL ADVISOR NUMBERS SWELL TO AN UNPRECEDENTED 440 NATIONWIDE.

Here's a few of the highlights from 2018: In March the company staged its "Experience Shines" national conference at the Surfers Paradise Marriott Resort & Spa attended by more than 400 participants. Highlights being the keynote addresses given by Saroo Brierley, whose enthralling story was encapsulated in the movie 'Lion; 60-minutes correspondent Allison Langdon and our very own MTA brand ambassador Jessica Watson.

July saw 20 years of hard work recognised when MTA co-managing

directors Karen and Roy Merricks stepped up to receive the award for 'Best Travel Broker Network' in front of industry peers at the National Tourism Industry Awards. In an industry first in October, MTA

66 July say 20 years of hard work recognised when MTA comanaging directors Karen and Roy Merricks stepped up to receive the award for 'Best Travel Broker Network'**99**



launched the ground-breaking, inhouse online accreditation program - 'MTA Professional Plus' designed to help further educate and support MTA Advisors in their day to day business and enhance their standing as travel industry professionals.

Then in November, yet another MTA Advisor reached the finals of the Avis Travel Agent Scholarship with Cei Creighton joining an exalted list of six MTA Advisors who have either won or made the finals for this prestigious award over the last seven years.

STRATEGIC PARTNERSHIPS GIVE TRAVELLERS CHOICE THE EDGE

TRAVELLERS CHOICE CONTINUED TO FIND SMART AND INNOVATIVE WAYS HELP ITS MEMBER SHAREHOLDERS GROW THEIR BUSINESSES IN 2018, WITH NEW STRATEGIC PARTNERSHIPS DELIVERING MARKET-LEADING PRODUCTS AND TECHNOLOGY SOLUTIONS.

Two exclusive new arrangements are set to deliver particular value to members in 2019.

The first is a partnership with Wetu Travel Technology that gives Travellers Choice members access to software that quickly and easily builds beautifully presented itineraries featuring rich imagery and interactive content. The itineraries – which can be customised and easily shared via a range of communication channels – don't just look good, research shows they also drive sales conversion rates.

Managing Director Christian Hunter said Wetu's Itinerary Builder solution was yet another addition to the company's suite of bespoke technology platforms.

"We pride ourselves on forging partnerships with technology providers like Wetu, whose inventive solutions can secure growth not just today, but sustainably into the future," Hunter says.

Travellers Choice has also entered into a partnership with Zenith Payments in order to secure its members a selection of new payment solutions. These include a layby option, a new business paymnt portal and a "game-changing and exclusive" group credit card merchant fee arrangement. The latter offers Travellers Choice members a commonrated merchant fee of 1.5% for all Australian-issued Visa and MasterCards, while at the same time providing protection against chargeback from supplier insolvency through AFTA's ACS scheme.

Hunter says that over the past 12 months Travellers Choice members have also embraced enhanced member support services such as TC Mail – an eDM platform that gives agents the ability to distribute targeted email campaigns to highly-segmented databases.

In addition, members have leveraged the national network's unique partnership with award-winning online travel agency TripADeal to generate significant new business, grow their databases and amplify their digital marketing activities.

Professional development is always a key focus and in 2018 a record number of Travellers Choice consultants took part in dedicated educational journeys. The group also unveiled its own Member Mentoring Program and further developed a Business Toolkit of customised templates that help

66 Members have leveraged the national network's unique partnership with award-winning online travel agency TripADeal to generate significant new business??

TRAVELLERS CHOICE

members construct vital planning documents. Plans are now afoot to produce a series of 'live' in-house training webinars in 2019 covering everything from marketing plans to social media and writing blogs.

On the financial front, Travellers Choice preserved its perfect record of delivering an operating profit every year of its 41-year history. The Travellers Choice Board returned 98% of the 2017/18 profit directly to members, who remain the company's sole shareholders.

Hunter says serving members will continue to sit at the very centre of everything the group does.

"We will continue to innovate. To forge partnerships that can deliver marketleading product and technology to our network. We will continue to provide significant rewards to our members that far outweigh the cost of participation. We will continue to attract the best talent to the organisation."

For more information on Travellers Choice visit the company's dedicated trade website – www.travelagentschoice.com.au.

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TRAVEL ASSOCIATES

IN 2018, TRAVEL ASSOCIATES CELEBRATED TWO DECADES WITH AN EXCITING YEAR OF GROWTH ACROSS AUSTRALIA.

As part of the wider Flight Centre Travel Group's Rebrand and Grow strategy, Travel Associates tackled a major opportunity to step away from the Flight Centre brand and shared service resource model, to establish itself as a standalone premium leisure business, including a new franchise model.

The groundwork has now been laid for Travel Associates to establish a stronger leisure offering with the curious traveller at its heart. The business is one of only a handful of brands in the Flight Centre Travel Group to have an international footprint, with the premium Travel Associates brand now operating in the United States and New Zealand.

Increasing its footprint over the last 10 months to around 85 offices, Travel Associates is the largest premium travel network in Australia and is defined by its 400 advisers who have a genuine passion for travel, seeking out unique and authentic experiences, immersing themselves in a destination's landscapes, culture and events.

This well-honed approach of trading unique travel ideas, inspiring tailored and rewarding experiences and an uncompromising service model is at the core of the Travel Associates concept.

Unrivalled industry connections, a highly-personalised approach and

TRAVEL

Celebrating 20 Years Est. 1998

the most knowledgeable advisers in Australia ensures our discerning clients benefit from every contact with the brand.

Travel Associates first opened its doors among the ornate homes of Canterbury, Melbourne in 1998, trialling a new concept of boutique, yet accessible travel planning for the Flight Centre Travel Group, using established networks and community connections to build a business with a total focus on uncompromising client service.

TRAVEL COUNSELLORS

IN APRIL 2018, REGIONAL MANAGING DIRECTOR KAYLENE SHUTTLEWOOD TOOK TO THE HELM OF TRAVEL COUNSELLORS AUSTRALIA, JUST WEEKS AHEAD OF THE ANNUAL CONFERENCE.

Themed "A Future Without Limits" and held in Cairns, the 2018 conference brought Travel Counsellors, partners, business leaders, support team, supplier partners and media together to celebrate their success.

With a robust 100-day plan, the business then began its journey of transformation and continuous improvement from developing the Melbourne support team, to increasing "on the road" training for Travel Counsellors, Travel Counsellors was awarded numerous awards in 2018 including the Amazon Growing Business Awards, and the Australian team was extremely proud to be named finalist in the NTIA awards for three categories and in two categories of the Australian Travel Awards. Travel Counsellors again spent \$10M on technology for Phenix and the myTC app. Travel Counsellors Australia has experienced steady growth in leisure sales while Travel Counsellors for Business, continues to go from strength to strength with even more key accounts providing a significant contribution to the business over the past year.

TCX will set the tone for 2019. TCX, or Travel Counsellors Experience will provide focus on delivering the best



experience for our Travel Counsellors, the support team, the community and of course, our customers. The Melbourne team continue to grow with several new roles and are planning an office relocation ahead of the annual conference in Adelaide in June, to accommodate this growth and future plans. Further training and development, process improvement and strong leadership will lead the business and enable it's Travel Counsellors to achieve great things in the year ahead.

TRAVEL PARTNERS

TRAVEL PARTNERS EMBRACED 2018 WITH GROWTH IN BOTH THE MOBILE AND MEMBER NETWORK SECTOR ACROSS AUSTRALIA.

Having thrived after the FCTG acquisition in October 2017, Travel Partners has doubled in numbers, increasing our mobile agents in all states, and member agencies. With the introduction of a new General Manager, working alongside existing management, a clear path was set for the company in 2018. Strong financial growth followed resulting in the best year ever in revenue for Travel Partners.

Our product range increased over the year and we saw both mobile and members embracing the Infinity range. A brand refresh launched a newer, modern take on the iconic Travel Partner logo. This was coupled with an exciting new range of collateral. Members also benefited from enhanced override payments and options to access Global and exclusive Expo Fares. Improved capabilities have allowed each member to target and market to their chosen demographics. Flight Centre Global Ball targets and the launch of Travel Partners Club Verve have given access to outstanding goals to aim for in



2019 for all agents.

Technology improvements, product enhancements, and focus on support were the achievements of 2018. This year will bring more of the same, and we look forward to helping all our current and new mobile and member agents reach their maximum potential as they run their own independent businesses with the backing of Australia's largest travel group.

TRAVEL MANAGERS

ACHIEVING THE BEST-EVER SALES MONTH IN FEBRUARY AND A RECORD-BREAKING FIRST QUARTER SET TRAVELMANAGERS ON THE RIGHT PATH FOR ANOTHER HIGHLY SUCCESSFUL YEAR.

It has been filled with outstanding achievements that have further cemented our position as Australia's premium, homebased travel network.

Our extensive, Australia-wide geographic coverage saw us reach the 550 personal travel manager (PTM) milestone, while a raft of supplier awards, including Cruiseco's Top 5 and Scenic's Top Home-based Travel Agency (both for the fourth year running) confirmed our high standing with partner suppliers. Key technology developments such as the implementation of individual PTM websites empowered PTMs to promote their own individual strengths and specialised areas of interest.

467 supplier/PTM cluster meetings, 796 individual face-to-face BPM/PTM meetings and record attendances at training/development/product update days ensured that our PTMs who work remotely are never 'remote' in the true sense of the word.

In August our first-ever North American conference saw the announcement of an industry-first, exclusive partnership with Luxury Escapes, along with the launch of the Network Assistance Programme (NAP), an initiative aimed at supporting members' health and wellbeing.

TravelManagers' philosophy of giving back to the community continues to be a key focus: many thousands of dollars Travel Managers As individual as you are

were raised this year in support of local charities and communities through fund raising events organized by the individual PTMs, such as a charity golf day in Melbourne which raised over \$16,000 for Love Your Sister.

The company's investment in people, technology advancement and training is ensuring that increased sales and business success follows – as evidenced by NSWbased PTM, Jo Patton, who in November became TravelManagers' second consecutive winner of the prestigious Avis Travel Agent Scholarship.







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^Royal Caribbean voted Best Cruise Operator – Domestic Deployment and Best Cruise Operator – International Deployment at the AFTA National Travel Industry Awards in 2016, 2017 and 2018.

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Reservations: 1300 304 135 Website: www.alaskaair.com

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Email: batikair@airinerepservices.com.au Website: www.cvfr.com.au/airline-repservices

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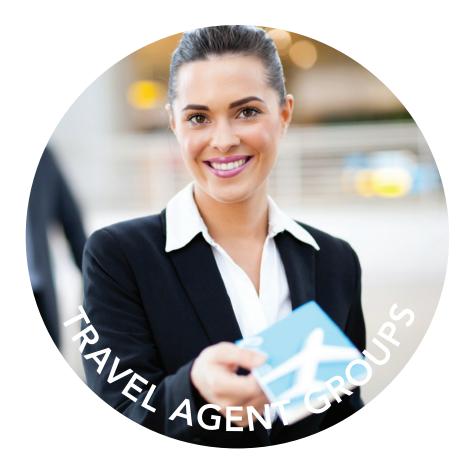
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