

# THE INTERNATIONAL MARKET PLACE



## Market Overview

International visitation in South Australia accounts for 6% of total visitor numbers and 5% of the total nights spent in Australia.

International expenditure accounts for 14% of visitor expenditure in South Australia.

China has grown significantly over the past five years, while the established western markets of United Kingdom, New Zealand and North America continue to perform well for South Australia.

Air capacity into South Australia has grown significantly over the past two years with over 14,000 weekly international seats from the state's key international markets.

South Australia is a destination which offers the international traveller diverse nature and wildlife, quality food and wine, accessible coastal experiences and authentic outback Australia experiences.

**Air Access** International carriers providing direct services to Adelaide include; Singapore Airlines, Cathay Pacific, Emirates, Malaysia Airlines, Air New Zealand, Virgin Australia and Jetstar International.

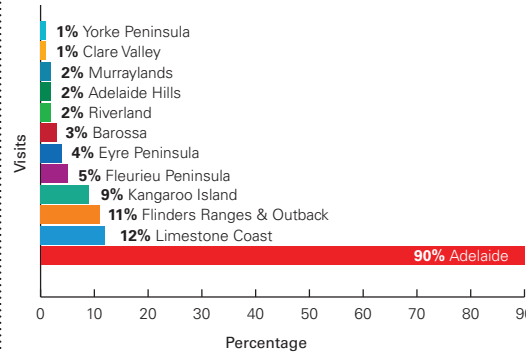
**Key Themes** Nature and wildlife, food and wine, coastal; outback, soft adventure; self-drive

## Fast Facts and Figures

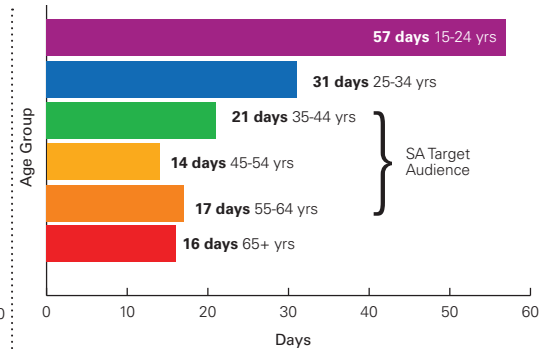
Data is based on a 3 year average for the years ending June 2012 to June 2014 for all purpose visitors.

INTERNATIONAL ARRIVALS					
South Australia	Holiday	VFR	Business	Other	Total
Visits	197,000	107,000	42,000	43,000	358,000
Nights	2,262,000	2,644,000	509,000	4,263,000	9,679,000
Average Length of Stay (nights)	11	25	12	99	27
<b>Expenditure</b>					<b>\$690,000,000</b>

## Key South Australian Overnight Destinations



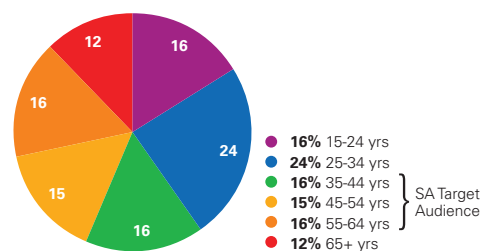
## Length of stay in South Australia by age group



## Appealing Experiences

- Adelaide acts as a strong part of all international itineraries and is the gateway to the regions.
- Kangaroo Island's diverse and abundant nature and wildlife.
- Authentic outback and wilderness experiences of the Flinders Ranges and Eyre Peninsula.
- Journeys that highlight Adelaide's location at the crossroads of several of the greatest Australian journeys.

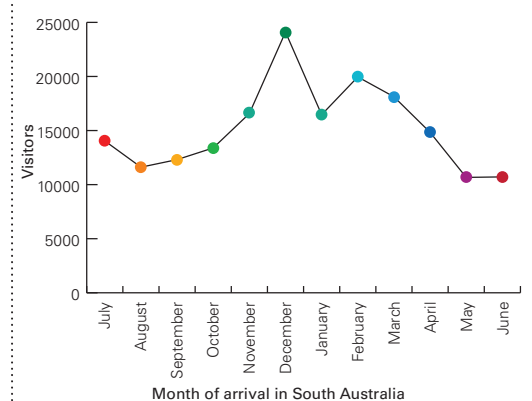
## Visitor Age Profile



**Target Market Profile** High yield experience seekers are the primary market segment for all markets excluding France and Italy. Travellers are experienced and looking for quality and unique experiences. Secondary markets include youth travellers visiting Australia on a Working Holiday Visa and young couples/professionals.

Average length of stay is influenced by longer staying education and VFR sectors.

## Seasonality



**Market Insights**

- The international market is highly competitive and is significantly different to the domestic market when offering your product or experience.
- When entering the international market you are not only competing for business against products that are similar but also against other destinations around the world.
- Entering the international market and selling your product internationally requires significant investment of time and money and it is essential to establish strong business relationships.
- Entering the international distribution system is a long term commitment and may take some time before you start to see a return on your investment.
- Be prepared to research your international target market and the best way you can reach them. Consider whether your experience meets their needs and whether it can be easily accessed.
- Once you have begun to establish yourself in an international market, you can start to maximise the opportunities by registering to attend the various trade shows relevant to your market.

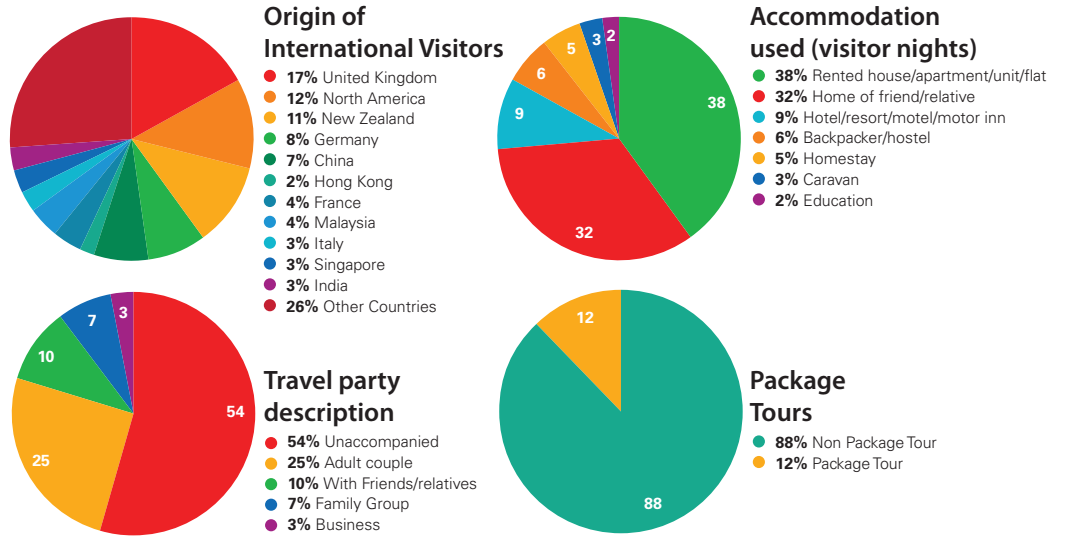
**Web Portals** The SATC develops and maintains web portals in each market that partner with wholesalers in each country, motivating consumers and converting interest into bookings. These sites are linked to southaustralia.com and some are in foreign languages.

**Contacts**

The International Group is comprised of head office staff and overseas representation who proactively market South Australia to the travel trade and consumers across Australia and overseas.

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This data includes Education and VFR purpose sectors.

**Key Distribution Partners** Primary Market Secondary Market

ITO	UK	Germany	France	Italy	New Zealand	USA	Greater China (inc HKG)	Singapore	Malaysia	India
AOT (Experience Tours Australia)	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
ATS Pacific	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
GTA (online wholesaler for individual smaller retail outlets)	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Goway Travel	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Terra Nova / Pacific Destinations	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Tour East / Qantas Holidays	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Southern World	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Australia One	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
APTC	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Pan Pacific	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Across Australia	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Holiday Pacific	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Tranquil Travel	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Wel Travel	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary
Flight Centre	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary

**Multi Market Online Travel Agents** There are three global online travel organisations with a reach to over 10 priority markets; Expedia; Priceline Network and Orbitz. Two others have a reach of over 5 markets; Sabre and Odigeo. All own and operate multiple brands:

Expedia	Orbitz	Priceline Network	Sabre	Odigeo
Expedia	Orbitz	Priceline	Travelocity	Opodo
eLong (China)	eBookers	Booking.com	Lastminute.com	eDreams
Hotels.com	Hotel Club	Agoda		
Trivago (Metasearch)	Mr Jet	Rentalcars.com		
Hotwire	Asia-Hotels.com	Kayak (Metasearch)		
CarRentals.com	Ratestogo.com	Active Hotels		
Expedia Local Expert	Trip			
Classic Vacations				

Please refer to individual market profiles for top travel sites in each market.

Source: International Visitor Survey, Tourism Research Australia, Canberra | Department of Immigration and Citizenship (DIAC) | VFR = Visiting Friends and Relatives Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia.

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