

INTERNATIONAL MARKET PROFILE UNITED KINGDOM



Market Overview

The United Kingdom continues to be South Australia's largest inbound market with strong leisure and visiting friends and relative visitation.

UK visitors are affluent experience seekers who generally travel without children and look for authentic and immersive experiences.

South Australia's nature and wildlife assets in Kangaroo Island and the Flinders Ranges and food and wine regions of Adelaide and surrounds have strong appeal.

Travellers disperse on self-drive journeys incorporating beautiful coastline on the Southern Ocean Drive (Adelaide to Melbourne) and majestic landscapes on the Explorer's Way.

Air Access

Airlines which provide direct access to Adelaide from the UK with one stop over include Singapore Airlines, Cathay Pacific, Emirates and Malaysia Airlines.

Key Themes

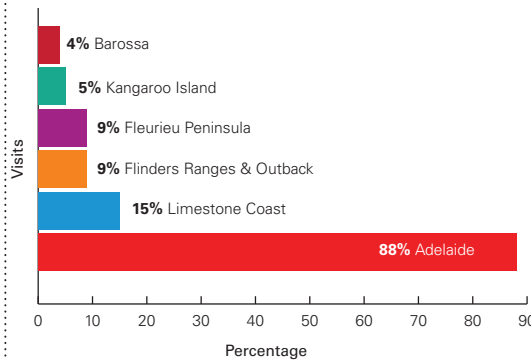
Coastal; nature and wildlife, food and wine, self-drive

Fast Facts and Figures

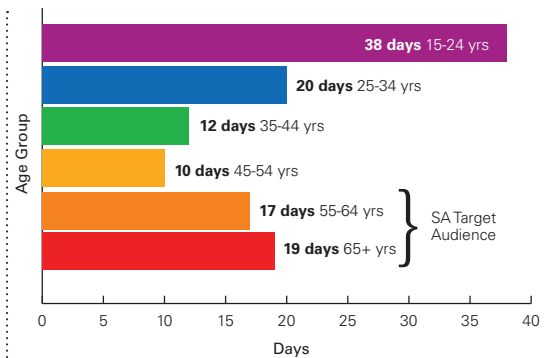
Data is based on a 3 year average for the years ending June 2012 to June 2014 for all purpose visitors.

| | UNITED KINGDOM | | | | |
|---------------------------------|---------------------|---------|----------|---------|-----------|
| South Australia | Holiday | VFR | Business | Other | Total |
| Visits | 33,000 | 27,000 | 4,000 | 4,000 | 60,000 |
| Nights | 323,000 | 576,000 | 36,000 | 215,000 | 1,149,000 |
| Average Length of Stay (nights) | 10 | 21 | 9 | 54 | 19 |
| Expenditure | \$72,000,000 | | | | |

Key South Australian Overnight Destinations



Length of stay in South Australia by age group

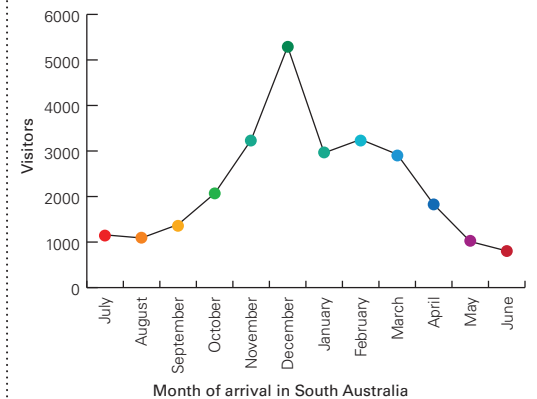


Appealing Experiences

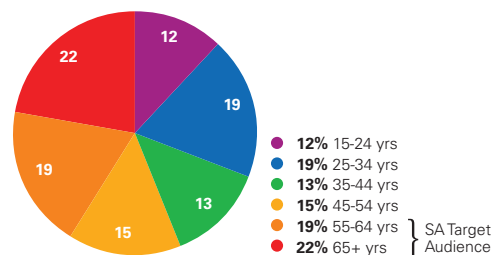
- Adelaide as the gateway to the regions and for the unique attractions like the emerging laneways, iconic Adelaide Oval and world-class dining options.
- Nature and wildlife assets found in Kangaroo Island and the Flinders Ranges
- Food and wine regions of Adelaide and surrounds
- Self-drive journeys including the Southern Ocean Drive (Adelaide to Melbourne touring route) and Explorer's Way.

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

Seasonality



Visitor Age Profile



Target Market Profile Affluent experience seeker: This market is generally older couples 50-69 years of age travelling as a couple, often second time visitors to Australia. Youth travellers and those visiting Australia on a Working Holiday Visa.



Government of South Australia

South Australian Tourism Commission

Market Insights

- The trade still remain extremely supportive and very important to the South Australian Tourism Commission's (SATC) strategy.
- The SATC works closely with major trade partners to ensure strong product representation and to grow market share.
- With the improvement of one stop airline access, this presents exciting opportunities to engage directly with consumers through PR and digital platforms.
- It is vital for operators to maintain strong relationships with all of the key inbound tour operators for this market.
- Online research and bookings are increasing, therefore an up to date website and the ability to book online is paramount.
- Work with other operators to put forward a wholesaleable product to inbound tour operators as single products can get lost due to a cluttered marketplace.
- Bird watching and major sporting events are two special interest travel niches from the UK market.

Social Media

UK/Nordic/Netherlands:
www.facebook.com/SouthAustraliaUK

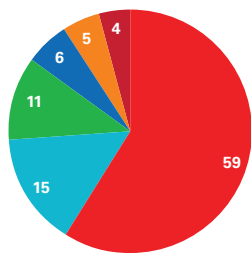
Contacts

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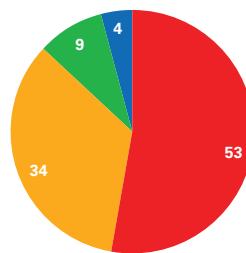
Inbound Distribution

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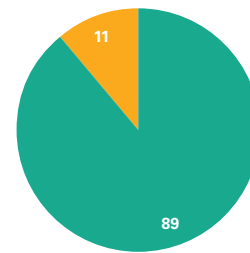
Accommodation used (visitor nights)

- 59% Home of friend/relative
- 15% Hotel/resort/motel/motor inn
- 11% Rented house/apartment/unit/flat
- 6% Caravan
- 5% Backpacker/hostel
- 4% Other



Travel party description

- 53% Unaccompanied
- 34% Adult couple
- 9% With Friends/relatives
- 4% Family Group



Package Tours

- 89% Non Package Tour
- 11% Package Tour

This data includes Education and VFR purpose sectors.

Key Distribution Partners

| Key Wholesale Partners | Inbound Representative Company in Australia |
|---|---|
| 1st Class Holidays | Southern World |
| Abercrombie & Kent | Direct |
| Audley Travel | ATS |
| Australia Sky | ATS |
| Austravel (TUI) | AOT / Direct |
| Barrhead Travel | ATS |
| Black Tomato | ATS / Southern Crossings |
| Bridge and Wickers | ATS |
| Cox and Kings | ATS |
| Exsus | Southern World / Wilderness Australia |
| Flight Centre UK (Infinity) | Direct (Infinity) |
| Freedom Australia | ATS |
| Kuoni Travel | AOT |
| Premier Holidays | ATS / Tour East |
| Scenic Tours | Direct |
| STA Travel | AOT / Direct |
| The Lotus Group | ATS |
| Gold Medal | ATS |
| Thomas Cook | ATS |
| Trailfinders | ATS / Direct |
| Travel Nation | ATS / Tour East |
| Stella Travel UK (Travel 2 / Travelbag) | ATS |
| Wexas | ATS |

Top Travel Websites

| | | |
|----------------|-----------------------|-----------------------|
| TripAdvisor | Mr&Mrs Smith | Travelocity |
| Expedia.co.uk | Opodo | TRAVELREPUBLIC.CO.UK |
| Cheapflights | Skyscanner | TRAVELSUPERMARKET.COM |
| Lastminute.com | Thomas Cook Group PLC | Travelzoo |
| Hotels.com | Booking.com | |

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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