

**SATC Industry Forum
Market Update Presentation
UK, Nordic, Benelux**

November 2011



Market Overview

UK

Largest market for South Australia in terms of visitors, second largest for visitor nights behind China.

Length of stay in South Australia is average 4-7 nights, a total of 11% visit the state as part of an overall Australian holiday (compared against total International visitors of 7%)

Largest demographic of visitors from the UK to Australia is 15 to 29 years (28%) and 60+ years (28%)

State visitation ranking in order – NSW, QLD, VIC, WA, SA, NT, ACT, TAS

UK arrivals to Australia (12 months ending Sept 2011)

There were 631,300 visitors from the UK, a **decrease of 2%** overall.

Holiday visits	-4%
Business visits	+8%
VFR visits	-5%

Market Overview

Nordic (Denmark, Sweden, Norway, Finland)

Visitor numbers for these markets year on year are all positive (although Denmark down -4%). Forecasts for 2011 indicate growth of approx 5%.

Nordic visitors average spend per person is higher than the average of all inbound visitors. Spend longer in Australia, average 43 nights compared to average UK visitors of 36 nights.

Benelux (Holland, Belgium)

Both markets continue to have a strong interest in travel.

They are highly independent travellers, staying longer and have a very highest level of dispersal than any markets.

Approx 90% of this market research online.

Ireland

Arrivals down approx 20% with huge financial and work struggles in the country



Challenges in Market

- Strong AU\$ contributes to make Australia an expensive destination
- Increased Air Passenger Duty - almost the same as the airfare circa £500
- Olympics 2012 and Euro 2012
- International airline access into Adelaide
- Time and distance, perception

Australia is visually prominent throughout the UK and features strongly in print, on-line, Social Media channels, trade campaigns and television - (Daybreak and joint airline activity). STO investment is strong, along with trade and TA airlines partners - Qantas, Emirates, Singapore Airlines.

Australia was awarded Best Country to Visit Worldwide at the British Travel Awards 2011. Countries were nominated by travel industry professionals before being voted for by over 700,000 members of the British public. The second best country went to Spain, followed by Italy.



Marketing Successes

£100 off flights and Hop across to Kangaroo Island for FREE

Four week multi-media campaign with Bridge the World, UK

- National press advertising
- Skype home page advertising (targeting VFR)
- Shop posters
- Homepage presence
- E-newsletters
- SMS messaging to 20,000 consumers
- Internet advertising - cheapflights.co.uk and dealchecker.com

Results:

95 flights sold direct into ADL

13 flights sold - one ways and children

78 room nights booked (not including tours)

12 Kangaroo Island tours booked

Drove awareness and confidence amongst BTW staff

Tactical promotions with cut through are integral to our efforts in the market



South Australia.
A brilliant blend.

PR Successes

Simon Bates' Travel with Smooth Radio

One week outside broadcast throughout South Australia – Adelaide, The Barossa, Kangaroo Island, Flinders Ranges

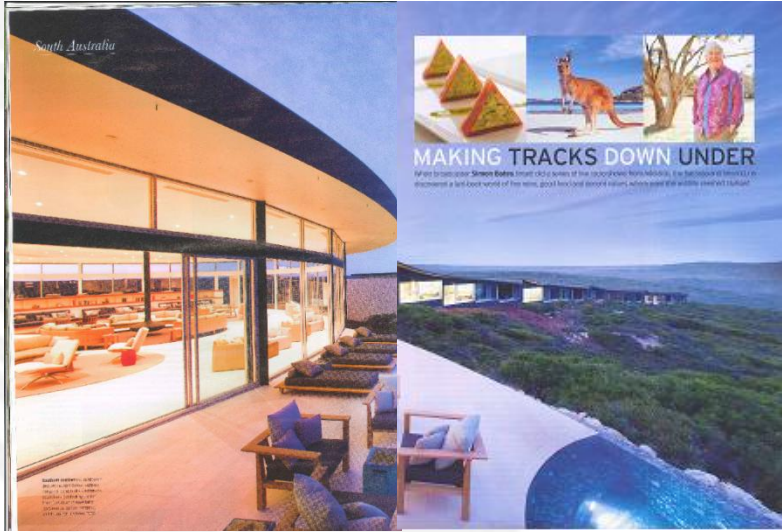
- Supported by on-line activity - micro-site and iphone app promoting South Australia with pages for partners, Travelbag and Peter Lehmann
- Pre promotional trails on-air
- Competition to win a trip to South Australia for two people
- Video diaries and blogs
- Newsletter to 80,000 consumers / PR

22 additional presenter live reads plus numerous un-measured mentions

SATC microsite - 2,300 click thrus, circa 5,000 competition entries with 1,549 opt-ins or 32% (10-13% opt-in is average)

Additional one hour broadcasting of Best of Bates' travel on Sunday - added value





An additional spin off with four pages of editorial in The Telegraph's Ultra Travel magazine, a special 44-page edition dedicated solely to Australia.

Further negotiation with TA for inclusion in upcoming Telegraph supplement with Emirates in Dec.

3 OTHER DESTINATIONS FOR WINE AND WILDLIFE

WESTERN AUSTRALIA

Two wine regions in the south-west of Western Australia are worth a visit. The Margaret River region is known for its Pinot Noir and Shiraz, while the Swan Valley is famous for its Riesling and Chardonnay. Both regions offer stunning coastal views and world-class wineries.

SOUTH AUSTRALIA

The Barossa Valley is a world-renowned wine region, famous for its Shiraz and Grenache. The McLaren Vale region is also a top wine destination, known for its Pinot Noir and Shiraz. Both regions offer a mix of world-class wineries and beautiful coastal scenery.

TASMANIA

Tasmania is a beautiful island state in the south-east of Australia, known for its stunning natural beauty and world-class wine. The island is home to a variety of wine regions, including the Tamar Valley, which is famous for its Pinot Noir and Shiraz.

MY HORSE WAS FITTED WITH A STOCKMAN'S SADDLE AS A ROLLS-ROYCE

When it comes to horse riding, there's nothing more satisfying than a good ride. And for many riders, that means a good horse and a good saddle. In this article, we explore the world of stockman's saddles, which are designed for the rugged terrain of the Australian outback. These saddles are built to last and provide a comfortable ride for both the rider and the horse. We'll look at the different types of stockman's saddles, the materials used in their construction, and the features that make them so special. Whether you're a professional rider or a weekend hobbyist, a stockman's saddle is a worthwhile investment for anyone who loves the outdoors.

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Major Plans and Focus 2011-2012

Target Segments

British Travellers, Affluent Couples - 50+

Youth, Adventure, Gap year/ WHM market -18 to 30

Key Positioning

Destination led rather than theme – SA needs identity

1. Kangaroo Island – Australia's best wildlife destination
2. Accessible South Australia – Kangaroo Island, Eyre Peninsula, The Barossa, Flinders Ranges/Outback (and naturally Adelaide)

Key Marketing Plans

SQ MOU, STA Travel, Trailfinders, Bridge the World, Food and Travel magazine, Bridge & Wickers - Luxury focus, Gold Medal, Flight Centre

On-line: Expedia, Black Tomato, Responsible Travel



Major Plans and Focus 2011-2012

Agent Famils

UK Product Managers Famil in conj with TA (Feb 2012)
QH Holidays Achievers Famil (concluded, 22 agents)
Nordic Famil (TBA)
Target PM/VIP for pre/post ATE famils (June 2012)

Agent Training

Agent Training including special focus events/functions, webinars
Increasing South Australian Aussie Specialists

PR Activities

Smooth Radio (concluded)
Daybreak (concluded)
Tasting Australia
Working with Wine Australia

Opportunities for Operators

- Responsibletravel.com
- Social Media 'Spike's Place' (Facebook)
- southaustralia.com
- Aussie Specialists newsletters - SA focus each month, opportunity for shared and solus newsletters - cost effective way for promotion and creating awareness of product.
- Get behind TA/STO initiatives - Corroboree 2013 TBA (hopefully SA), New Product Workshop 2012, Roadshows, Famils and other initiatives
- Keep us updated (via HQ) with latest developments and news stories as this material is what we need more of, and what journalists and agents thrive on

Support for South Australia is critical in the market to ensure greater leverage and coverage, as well as driving awareness of experiences

