

INTERNATIONAL MARKET PROFILE

THE INTERNATIONAL MARKETPLACE



MARKET OVERVIEW

- ▶ International visitation in South Australia accounts for 5% of total visitor numbers and 3% of the total nights spent in Australia.
- ▶ International expenditure accounts for 17% 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 continues to grow. Adelaide Airport services 13,600 weekly international seats from key international markets.
- ▶ South Australia is a destination which offers the international traveller diverse nature and wildlife, quality food and wine, accessible coastal and aquatic experiences and authentic outback Australia experiences.

FAST FACTS & FIGURES

Data is based on a 3 year annual average for the years ending Dec 2016 – Dec 2018 for all purpose visitors.

CHINA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	246,000	147,000	47,000	45,000	452,000
Visits (AUS)	4,356,000	3,194,000	968,000	1,480,000	8,099,000
Nights (SA)	2,313,000	3,234,000	483,000	4,245,000	10,275,000
Nights (AUS)	80,018,000	75,089,000	10,283,000	97,836,000	263,226,000
ALOS - Nights (SA)	9	22	10	94	23
ALOS - Nights (AUS)	18	24	11	66	33
EXPENDITURE					\$1,072,000,000

APPEALING EXPERIENCES

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

TARGET MARKET PROFILE

- ▶ High value travellers are the primary market segment for all markets excluding France and Italy. Travellers are seasoned and looking for unique, quality experiences. Secondary markets include youth travellers visiting Australia on a Working Holiday Visa and young couples/professionals.

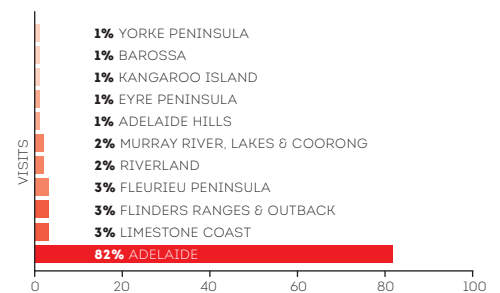
AIR ACCESS

- ▶ International carriers providing direct services to Adelaide include Singapore Airlines, Cathay Pacific, Emirates, China Southern Airlines, Qatar Airways, Malaysia Airlines, Air New Zealand, Fiji Airways, Jetstar International and Malindo Air.

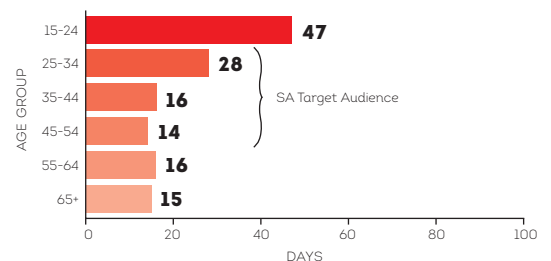
KEY THEMES

- ▶ Nature & wildlife
- ▶ Food & wine
- ▶ Aquatic & coastal
- ▶ Outback
- ▶ Soft adventure
- ▶ Self-drive

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

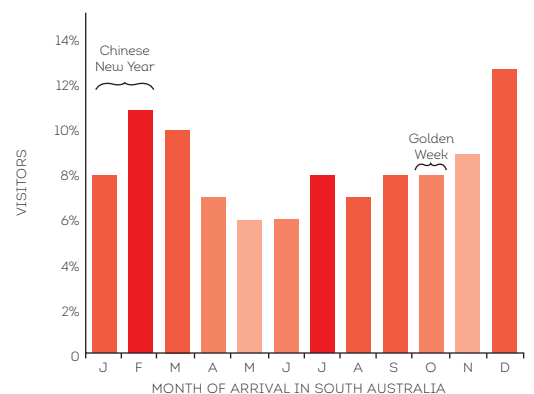


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

SEASONALITY



Note: Peak travel period to Australia during Chinese New Year in January/February and Golden Week in October.

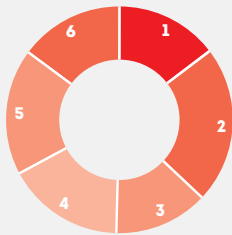


INTERNATIONAL MARKET PROFILE

THE INTERNATIONAL MARKETPLACE

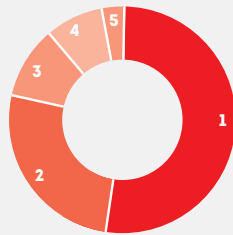


VISITOR AGE PROFILE



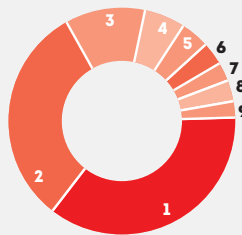
- 1 15-24 **15%**
- 2 25-34 **22%**
- 3 35-44 **14%**
- 4 45-54 **17%**
- 5 55-64 **18%**
- 6 65+ **15%**

TRAVEL PARTY DESCRIPTIONS



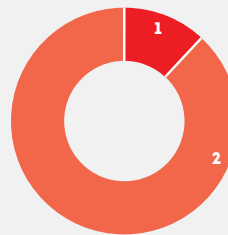
- 1 Unaccompanied **52%**
- 2 Adult couple **26%**
- 3 Family group **10%**
- 4 With friends/relatives travelling together **8%**
- 5 Business **3%**

ACCOMMODATION USED



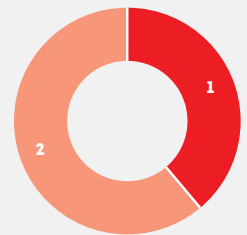
- 1 Rented house/apartment/unit/flat **35%**
- 2 Home of friend/relative **32%**
- 3 Hotels and similar accommodation **12%**
- 4 Homestay **6%**
- 5 Other **4%**
- 6 Education institution (University / school dormitory or college) **3%**
- 7 Backpacker or hostel **3%**
- 8 Caravan and Camping **3%**
- 9 Own property **2%**

PACKAGE TOURS



- 1 Package tour **12%**
- 2 Non-package tour **88%**

FIRST OR RETURN VISIT



- 1 First visit **40%**
- 2 Return visit **60%**

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.

TOP TRAVEL WEBSITES

EXPEDIA

- EXPEDIA
- ELONG (CHINA)
- HOTELS.COM
- TRIVAGO (METASEARCH)
- HOTWIRE
- CARRENTALS.COM
- EXPEDIA LOCAL EXPERT
- CLASSIC VACATIONS
- ORBITZ
- EBOOKERS

BOOKINGS HOLDINGS

- PRICELINE
- BOOKING.COM
- AGODA
- RENTALCARS.COM
- KAYAK (METASEARCH)
- ACTIVE HOTELS

SABRE

- TRAVELCITY
- LASTMINUTE.COM

OPIGEO

- OPODO
- EDREAMS

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

SOCIAL MEDIA

- Find our Facebook page at [SeeSouthAustralia](#)

INTERNATIONAL MARKET PROFILE

THE INTERNATIONAL MARKETPLACE

KEY DISTRIBUTION PARTNERS

ITO	UK	GERMANY	FRANCE	ITALY	NEW ZEALAND	NORTH AMERICA	GREATER CHINA (INC HONG KONG)	SINGAPORE	MALAYSIA	INDIA
ABERCROMBIE & KENT	Primary	Primary	Primary	Primary	Primary	Primary				
ACROSS AUSTRALIA			Primary							
ALQUEMIE	Primary	Primary	Primary	Primary			Primary	Primary		
ANZCRO	Primary				Primary					
AOLIDAY							Primary			
AOT (EXPERIENCE TOURS AUSTRALIA)	Primary	Primary	Primary	Primary	Primary	Primary	Secondary	Secondary	Secondary	Secondary
APTC		Primary								
ATS PACIFIC	Primary	Primary	Primary	Primary		Primary				
AUSTRALIA ONE	Secondary	Primary								
EPIC PRIVATE JOURNEYS						Primary				
FOUR Z'S TRAVEL							Primary			
FLIGHT CENTRE	Primary				Primary	Primary				
GOWAY TRAVEL	Primary	Primary				Primary				
GTA (ONLINE WHOLESALER FOR INDIVIDUAL SMALLER RETAIL OUTLETS)	Primary	Secondary			Primary	Secondary				
HOLIDAY PACIFIC								Primary	Primary	Primary
ONE PACIFIC						Primary				
PAN PACIFIC	Primary	Primary	Primary	Primary		Primary				
SOUTHERN WORLD	Primary					Primary				
TERRA NOVA / PACIFIC DESTINATIONS		Primary								
TOUR EAST / QANTAS HOLIDAYS	Primary	Secondary	Secondary		Primary		Secondary	Secondary	Secondary	Secondary
TRANQUIL TRAVEL							Primary			
WEL TRAVEL								Primary	Primary	Primary
WINGON TOURS							Primary	Primary	Primary	

■ Primary Market ■ Secondary Market

CONTACTS MARKETING

CLAIRE SIM
SENIOR MANAGER,
GLOBAL MARKETS
CLAIRE.SIM@SA.GOV.AU

DISTRIBUTION

TRADE@TOURISM.SA.COM



Source: International Visitor Survey Dec 16, Dec 17 & Dec 18 conducted by Tourism Research Australia. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2016 to Dec 2018. Totals may not add to 100% due to rounding. np = not published due to small sample size. VFR = Visiting Friends and Relatives, ALOS = Average Length Of Stay (Nights). Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia. Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete or suitable for the purposes for which you wish to use it. By using this information you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information. Produced by the South Australian Tourism Commission April 2019.