

INTERNATIONAL MARKET PROFILE

UNITED KINGDOM

MARKET OVERVIEW

- ▶ The United Kingdom (UK) continues to be South Australia's largest inbound market with strong leisure and visiting friends and relatives visitation.
- ▶ UK visitors are affluent experience seekers who generally travel without children and look for authentic and immersive experiences. They especially tune in to local people, through the strong ties between Britain and Australia.
- ▶ South Australia's nature and wildlife assets on Kangaroo Island, the Eyre Peninsula and in the Flinders Ranges & Outback as well as the food and wine regions of Adelaide and surrounds have strong appeal.
- ▶ Being a mature market with long length of stay and propensity for self-drive, visitors from the UK disperse well throughout the state.

FAST FACTS & FIGURES

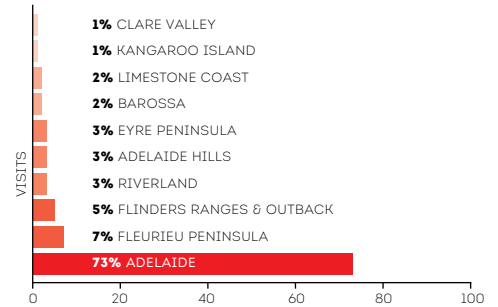
Data is based on a 3 year annual average for the years ending Dec 2016 - Dec 2018 for all purpose visitors.

UNITED KINGDOM	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	36,000	29,000	5,000	3,000	65,000
Visits (AUS)	387,000	421,000	62,000	112,000	684,000
Nights (SA)	295,000	533,000	61,000	131,000	1,019,000
Nights (AUS)	9,918,000	8,266,000	834,000	3,748,000	22,766,000
ALOS - Nights (SA)	8	18	12	44	16
ALOS - Nights (AUS)	26	20	13	33	33
EXPENDITURE					\$86,000,000

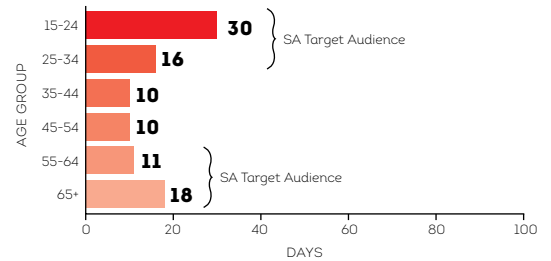
APPEALING EXPERIENCES

- ▶ Adelaide as Australia's vineyard city and gateway to the regions. Boutique city with coast and hills on the doorstep. Attractions such as the arts/mural dotted streets, laneways/hideaway bars, iconic Adelaide Oval and world-class dining options.
- ▶ Accessible wildlife and nature with Kangaroo Island being the primary focus for immersive and up-close experiences.
- ▶ Outback and nature in the Flinders Ranges & Outback from glamping to 4-wheel drive, walking and wildlife.
- ▶ Coastal and aquatic experiences on the Eyre Peninsula are emerging and gaining traction through visiting media and trade.
- ▶ Food and wine with emphasis on paddock and ocean to plate. Main regions include Barossa, Adelaide Hills and Fleurieu which continue to develop with new offerings intertwined with nature experiences.
- ▶ Self-drive journeys including the Southern Ocean Drive (Adelaide to Melbourne touring route) and the Explorers Way (Adelaide to Alice Springs/Darwin). Train Journeys have particular appeal to the UK market.
- ▶ Niche and special interest experiences such as birdwatching and walking.

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

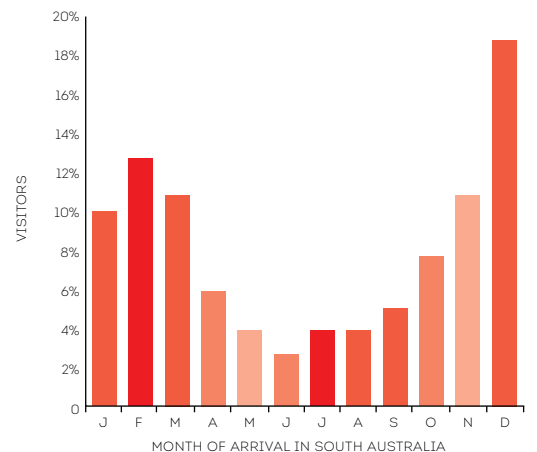


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

SEASONALITY

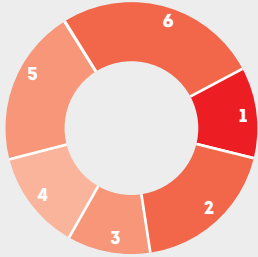


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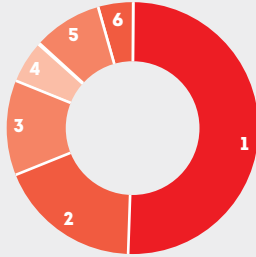


VISITOR AGE PROFILE



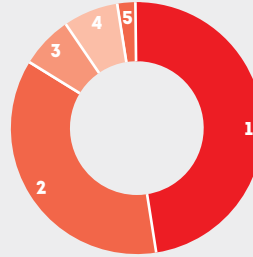
- 1 15-24 **12%**
- 2 25-34 **19%**
- 3 35-44 **10%**
- 4 45-54 **13%**
- 5 55-64 **20%**
- 6 65+ **26%**

ACCOMMODATION USED



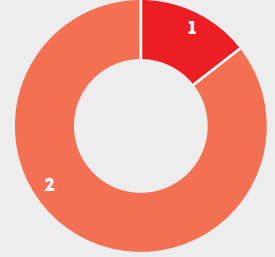
- 1 Home of friend/relative **51%**
- 2 Rented house/apartment/unit/flat **18%**
- 3 Hotels and similar accommodation **12%**
- 4 Backpacker/hostel **5%**
- 5 Other **11%**
- 6 Homestay **4%**

TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied **48%**
- 2 Adult couple **36%**
- 3 Family group **6%**
- 4 With friends/relatives travelling together **8%**
- 5 Business **2%**

PACKAGE TOURS



- 1 Package tour **14%**
- 2 Non-package tour **86%**

TARGET MARKET PROFILE

- ▶ This target market is comprised of affluent experience seekers: generally older couples 50-69 years of age who are often second time visitors to Australia.
- ▶ Youth travellers and those visiting Australia on a Working Holiday Visa are also integral.

AIR ACCESS

- ▶ Airlines which provide direct access to Adelaide from the UK with one stopover include Singapore Airlines, Cathay Pacific, Emirates, Malaysia Airlines, Qantas Airways, Qatar Airways and China Southern Airlines.
- ▶ Emirates and Qatar Airways offer regional connections with one stop connections from the UK to Australia out of Birmingham, Manchester, Cardiff (Qatar only), Ireland and Scotland. Singapore Airlines also offer regional connections from Manchester.

KEY THEMES

- ▶ Coastal
- ▶ Nature & wildlife
- ▶ Food & wine
- ▶ Self-drive & Journeys

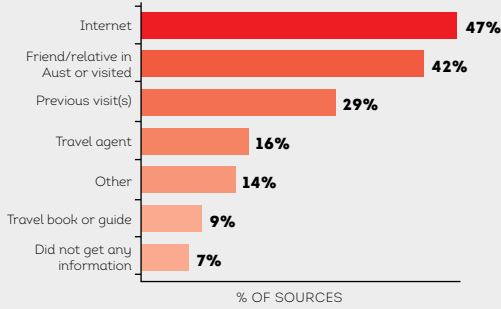
MARKET INSIGHTS

- ▶ The trade remains extremely supportive and are very important to the South Australian Tourism Commission's (SATC) strategy. At the stage of booking, over 50% of consumers book out of region travel via distributors, with travel agents (either in person or telephone) being the Number 1 booking source.
- ▶ The SATC works closely with key trade partners to ensure strong product representation, conversion 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. When it comes to preferred sources for early planning, UK travellers are using a combination of online and offline sources, including general internet searching, talking to friends and family and past travel which makes up 82% of researching a destination.
- ▶ 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.

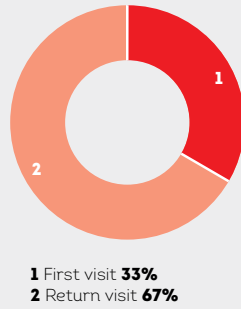
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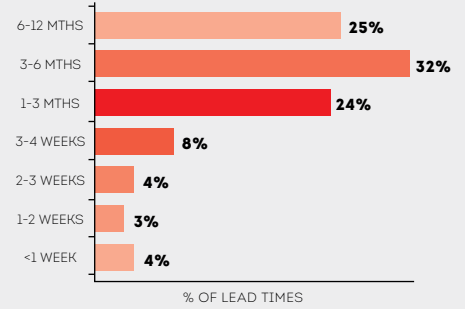
INFORMATION SOURCES



FIRST OR RETURN VISIT



BOOKING LEAD TIMES



KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
1ST CLASS HOLIDAYS	SOUTHERN WORLD & PAN PACIFIC
ABERCROMBIE & KENT	DIRECT
AUDLEY TRAVEL	ATS PACIFIC
AUSTRAVEL	AOT & DIRECT
BRIDGE AND WICKERS	SOUTHERN WORLD & ATS PACIFIC
BARRHEAD TRAVEL	ATS PACIFIC
COX & KINGS	ATS PACIFIC
DESTINOLOGY	PAN PACIFIC
FLIGHT CENTRE UK	DIRECT (INFINITY)
FREEDOM AUSTRALIA	ATS PACIFIC
GOLD MEDAL / TRAVEL 2	ATS PACIFIC
IF ONLY	PAN PACIFIC
KUONI TRAVEL	AOT
PREMIER HOLIDAYS	ATS PACIFIC
STA TRAVEL	AOT & DIRECT
THE LOTUS GROUP	ATS PACIFIC
THE TUROUOISE HOLIDAY COMPANY	SOUTHERN WORLD
TRAILFINDERS	DIRECT & ATS PACIFIC
TRAVELBAG	ATS PACIFIC
TRAVEL COUNSELLORS	SOUTHERN WORLD
TRAVEL NATION	SOUTHERN WORLD
WEXAS	PAN PACIFIC

CONTRACTING & BROCHURE TIMES

Brochure contracting and production takes place from July to October for release in November/December. Brochure validity is 1 April - 31 March.

TOP TRAVEL WEBSITES

GOOGLE FLIGHTS	TRIPADVISOR
MR&MRS SMITH	TRAVELOCITY
EXPEDIA.CO.UK	OPODO
TRAVELREPUBLIC.CO.UK	CHEAPFLIGHTS
SKYSCANNER	TRAVELSUPERMARKET.COM
LASTMINUTE.COM	TRAVELZOO
HOTELS.COM	BOOKING.COM
BLACK TOMATO	KAYAK.CO.UK

SOCIAL MEDIA

 Find our Facebook page at [SeeSouthAustralia](#)

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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.