

INTERNATIONAL MARKET PROFILE

HONG KONG

MARKET OVERVIEW

- Hong Kong represents a small but stable market that has direct air access to Adelaide.
- Majority of consumers speak some English and are mature travellers.
- Hong Kong consumers seek value for money. However, there is also a mature luxury travel segment.
- South Australia is positioned as an appealing holiday destination for independent travellers seeking Australia's best food and wine, nature and self-drive experiences. Seafood has very strong appeal.
- Hong Kong visitors have limited dispersal to regional South Australia, yet visitation through the Limestone Coast and Kangaroo Island indicates that this market enjoys self-drive journeys along some of the state's iconic touring routes.

FAST FACTS & FIGURES

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

HONG KONG	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	6,000	5,000	1,000	2,000	13,000
Visits (AUS)	144,000	97,000	28,000	32,000	254,000
Nights (SA)	67,000	82,000	4,000	213,000	366,000
Nights (AUS)	2,347,000	1,491,000	262,000	2,836,000	6,936,000
ALOS - Nights (SA)	11	16	4	107	28
ALOS - Nights (AUS)	16	15	9	89	27
EXPENDITURE	\$51,000,000				

APPEALING EXPERIENCES

- The Eyre Peninsula's seafood experiences are very appealing to Hong Kong's premium consumer segment.
- South Australia is a perfect self-drive destination as indicated through visitation of the Limestone Coast as part of the Southern Ocean Drive (Melbourne to Adelaide touring route).
- Kangaroo Island provides some of the best nature and wildlife experiences.

TARGET MARKET PROFILE

- Educated professionals, 28-50 years old in middle to high class groups. They enjoy traveling to experience fine food and wine, along with nature and wildlife.
- The majority of this market have been to Australia previously and are willing to travel independently and undertake activities such as self-drive, and stay nights outside of the main cities. This segment may travel with children during school holiday periods.

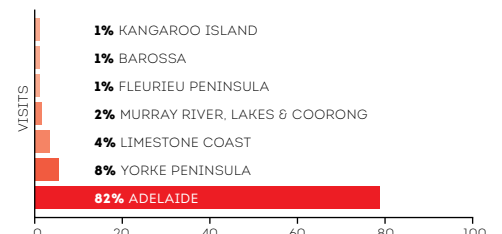
AIR ACCESS

- Hong Kong consumers can reach Adelaide direct via Cathay Pacific.
- Airlines that provide direct access to Adelaide with one stopover include Qantas Airways, Singapore Airlines and Virgin Australia.

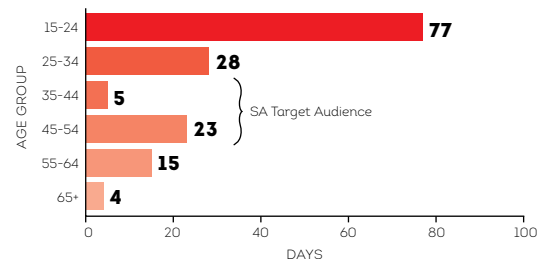
KEY THEMES

- Food & wine
- Nature & wildlife
- Self-drive

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

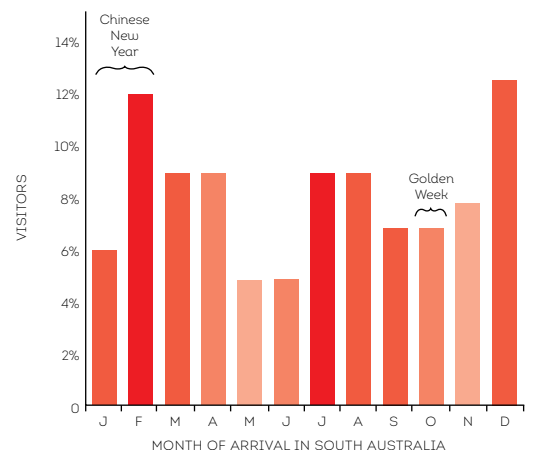


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

SEASONALITY

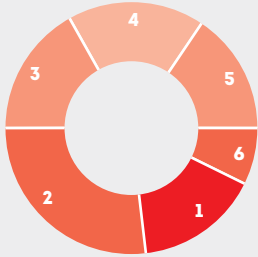


Note: Peak travel period to Australia during Chinese New Year in January/February and Golden Week in October.

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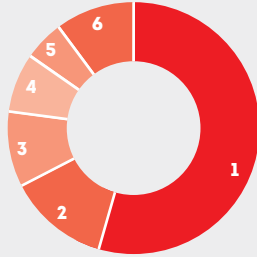
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VISITOR AGE PROFILE



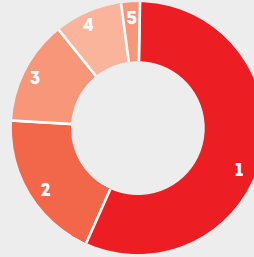
- 1 15-24 **16%**
- 2 25-34 **27%**
- 3 35-44 **17%**
- 4 45-54 **18%**
- 5 55-64 **16%**
- 6 65+ **7%**

ACCOMMODATION USED



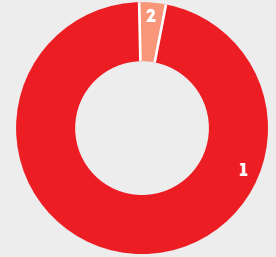
- 1 Rented house/apartment/unit/flat **55%**
- 2 Home of friend/relative **13%**
- 3 Homestay **10%**
- 4 Hotels and similar accommodation **8%**
- 5 Education institution (University / school dormitory or college) **5%**
- 6 Other **10%**

TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied **57%**
- 2 Adult couple **19%**
- 3 Family group **13%**
- 4 With friends/relatives travelling together **10%**
- 5 Business **1%**

PACKAGE TOURS



- 1 Non-package tour **97%**
- 2 Package tour **3%**

MARKET INSIGHTS

- ▶ Most arrangements for group tours are handled by the inbound tour operators based in Sydney and Melbourne who are critically important and need to be engaged.
- ▶ The South Australian Tourism Commission will continue to focus on free and independent travellers (FIT) in both consumer direct activities and promotions with key airline, trade and affinity partners.
- ▶ Generally speaking, people from Hong Kong enjoy travelling and travel is part of their lifestyle, indicating that they are experienced FIT.
- ▶ Travellers carefully consider what they spend and the value it offers. They are looking for a variety of travel and interactive experiences. They are strong advocates as they enjoy sharing experiences with others either through word of mouth or digital platforms.
- ▶ The booking lead time for leisure is short except for Chinese New Year.
- ▶ Specialised niche travel agents are growing in the market catering to a specific target segment promoting experiences such as golf, luxury, honeymoon, diving etc.
- ▶ Major travel agents are also developing new and themed itineraries such as photography, international marathons and cycling tours. Moreover, travel agents have increased their focus online in order to capture a larger market share of FIT travellers.
- ▶ Cruise packages are increasing in demand and are popular amongst families.

TOP TRAVEL WEBSITES

- | | |
|----------------|---------------|
| BOOKING.COM | HOTELS.COM.HK |
| CATHAY PACIFIC | EXPEDIA.COM |
| ZUJI.COM | KLOOK.COM |

SOCIAL MEDIA

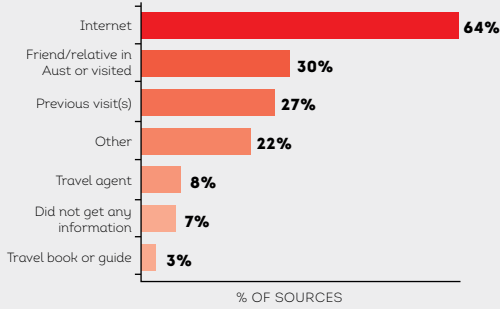
- ▶ Find our Facebook page at [SeeSouthAustralia](https://www.facebook.com/SeeSouthAustralia)



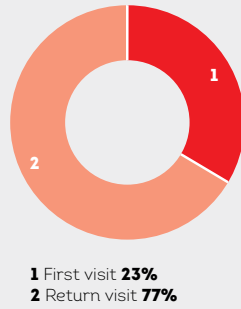
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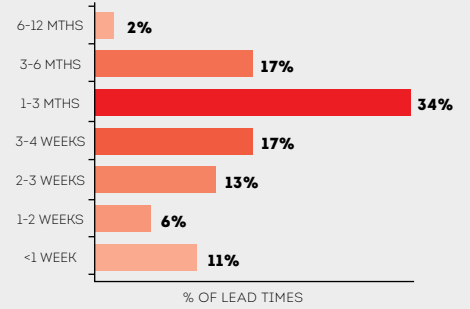
INFORMATION SOURCES



FIRST OR RETURN VISIT



BOOKING LEAD TIMES



KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
SINGAPORE AIRLINES HOLIDAYS	EXPERIENCE TOURS AUSTRALIA (ETA)
TRAVEL EXPERT	AUSTRALIAN TOURS MANAGEMENT (ATM)
EGL TOURS	GTA
HONG THAI	TOUR EAST
WESTMINSTER	AUSTRALIA AND BEYOND HOLIDAYS (AABH)
WINCASTLE	
WING ON	
JETOUR	

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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.