

GLOBAL MARKETING INDUSTRY FOURM

23rd SEPTEMBER 2022





UK & NORTHERN EUROPE

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ADELAIDE
SOUTH AUSTRALIA



THERE'S NOTHING LIKE AUSTRALIA



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Come and say G'day
FROM 21 FEBRUARY 2022



Her Majesty The Queen
Elizabeth II
1926 – 2022



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CONSUMER CONFIDENCE IS AT A NEW RECORD LOW

0.2%

**GDP FORECAST 2023
to 1% in 2024
UK slowest growth of
G7 countries**

10.1%

INFLATION RATE (July)

3.8%

UNEMPLOYMENT RATE

BRITS HAVE A THIRST FOR TRAVEL AND A LOVE FOR AUSTRALIA



AIRLINE AIRSCAPE FROM UK



Capacity at 78-80% of pre-Covid from Sep to Dec-22, increasing to 86% by Mar-23



Capacity increase to 97% of pre-Covid in Sep-22. Expected to reach 112% by Dec-22



Capacity at 55% of pre-Covid in Sep-22 and will remain similar for the foreseeable

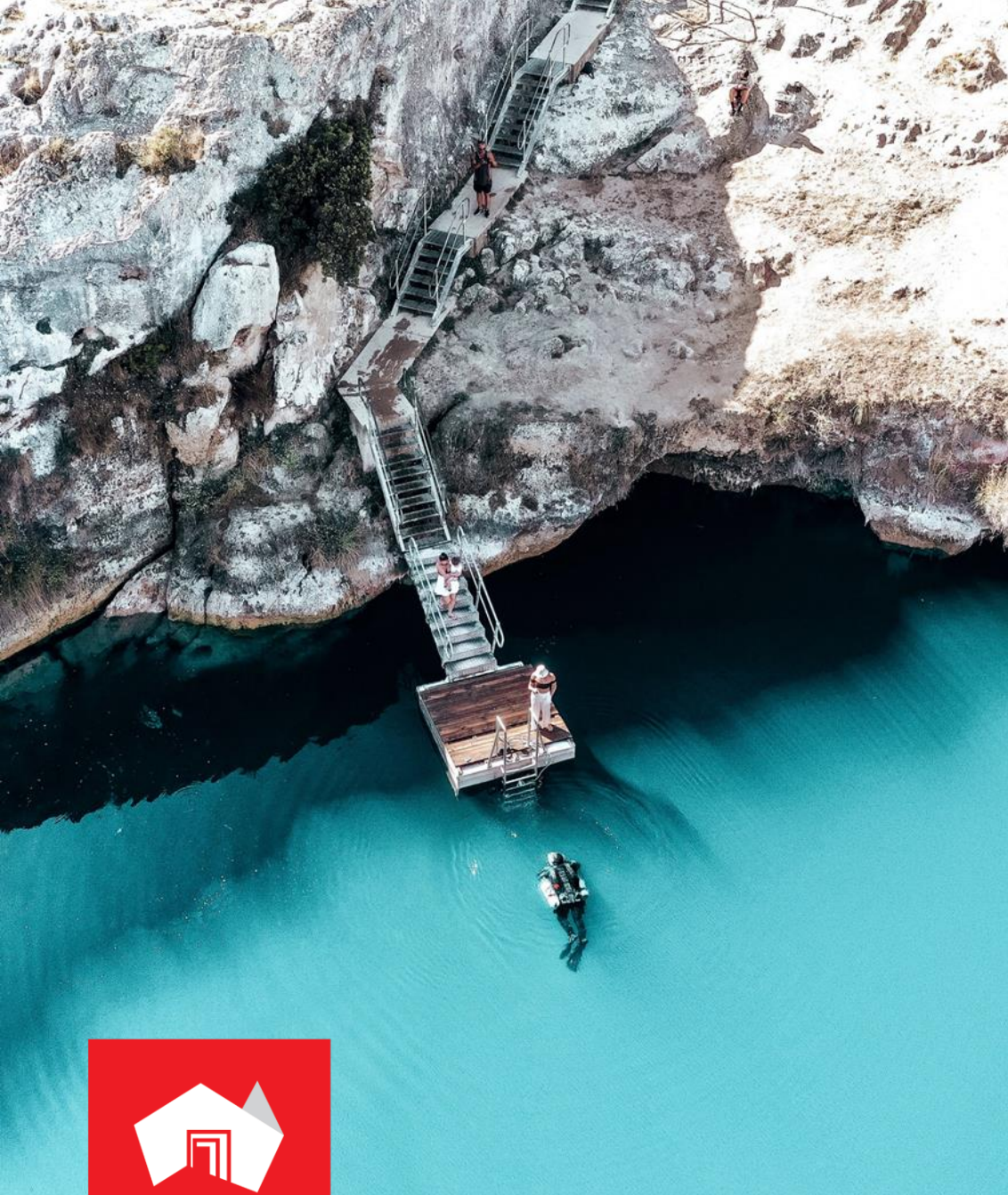


London-PER direct service remains daily with 253 seats through to Mar-23

KEY OPERATORS IN THE UK

There's a lot of new Product Managers in the UK who are willing to make their mark and make changes to current programs.





KEY OPERATORS NORTHERN EUROPE

Holland/Belgium

- QAS Holidays – great knowledge of South Australia
- Aussie Tours (part of Best of Group) – specialists in Australia
- Travel Essence – specialist operator to Australia, preference for small boutique accommodation, direct contracting
- Antipodes – strong supporter for Australia
- Travel Trend – B2B, large product range in Australia



KEY OPERATORS NORTHERN EUROPE

Nordics

- **Australiareiser** – key operator, specialists in Australia
- **MyPlanet** – key operator, specialists in Australia
- **Nyhavn** – luxury operator, solid knowledge of South Australia.
- **Tour Pacific** – mainly group business but growing FIT
- **Blixen Tours** – new operator for Australia. Martin Dahl Jespersen (ex Australiareiser) setting up Australia program

INDUSTRY RECOVERY FOR AUSTRALIA

- Immediate VFR demand has driven confidence in long-haul travel to Australia
- In the first week of March 2022 flight searches from UK to Australia reached 93% and forward bookings were at 81% compared to the same week in 2019
- Key partner bookings (4 months since Australia's reopening):

Trailfinders - booked 20,278 pax
(+4% above pre-Covid 2019 bookings)

Flight Centre - booked 8,186 pax

Audley Travel - booked 312 pax
(av spend of £9,432 per person)

CHALLENGES

AVAILABILITY

**ACCESS TO
RATES**

ITOs

STAFFING



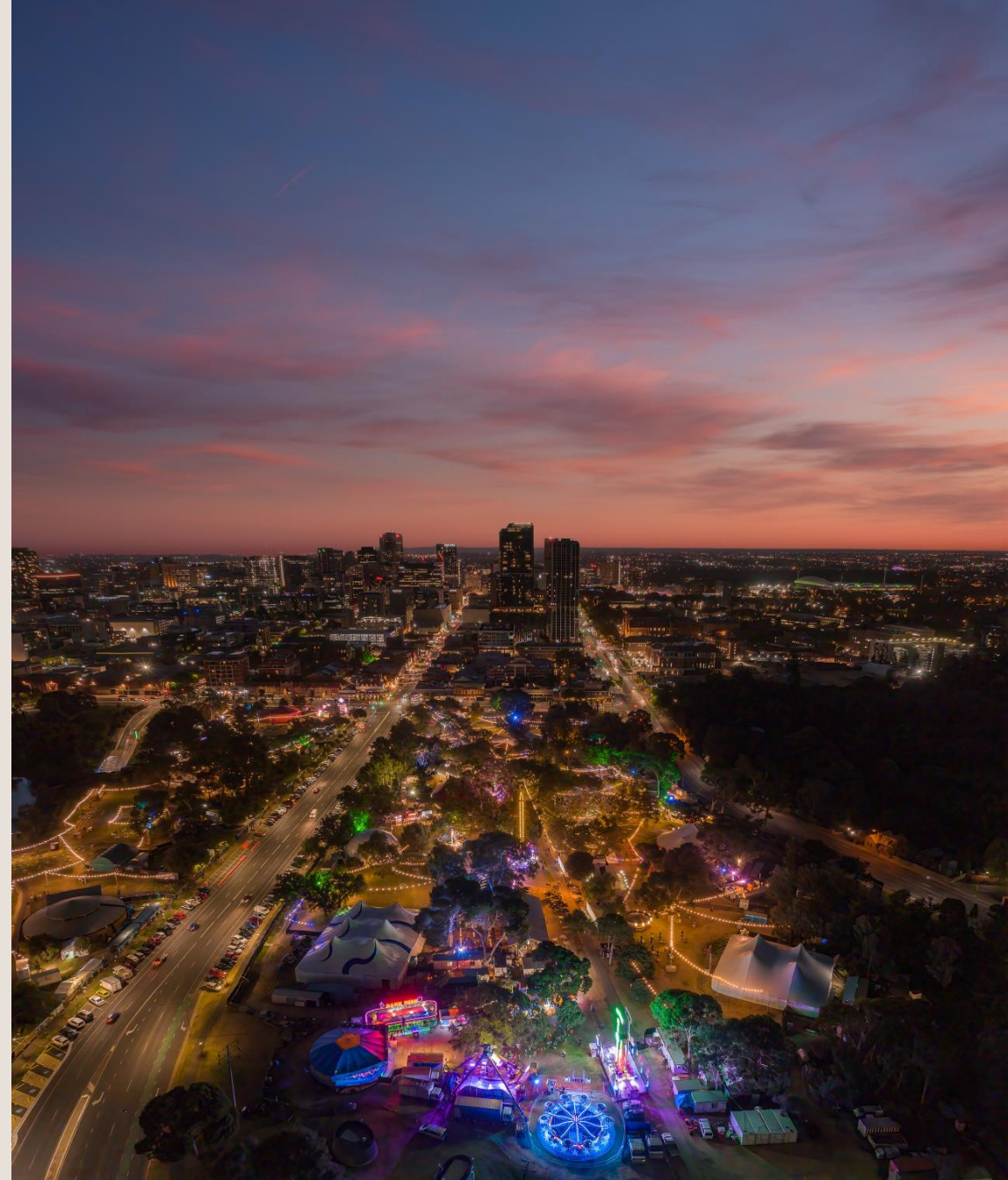
FORWARD TRENDS

- **Sustainable travel** – shift in public consciousness, from animal welfare to plastics, responsible travel has reached a tipping point
- **Aliveness and Optimisation** – people are willing to **test their limits**, bucket list adventures will become reality
- **Average booking value, length of holiday and spend increasing**



FORWARD TRENDS

- **Flexibility** is ranked at the top of traveller priorities as they adapt to the realities of Covid
- Growth in **adventure and wellness** holidays
- Simplicity and Seclusion – **reconnecting with nature**
- **Transformative travel** – people want to come home not just having tried something different, but ‘feeling transformed’ by it



THE OUTLOOK FOR SOUTH AUSTRALIA

**HIGH VALUE
TRAVELLERS**

**VISITING
FRIENDS/FAMILY**

**WORKING
HOLIDAY MAKER**



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CREATING THE DESIRE

- Support **Tourism Australia's One Voice partnerships** to create greater awareness of South Australia, maximising spend and widening audience reach
- **Targeted** campaigns:
 - Kangaroo Island (pan European – Germany/Italy)
 - Safaris (with Tourism Western Australia)
 - Wanderlust magazine (using Influencers for content)
 - Ocean to Outback (with Tourism NT)
 - Broadcast, online and print (airline partnership)
 - Working Holiday makers (pan European – Germany/France)



YOUTH & WORKING HOLIDAY MAKER

- Opportunity for the SATC to promote the state as a compelling destination for work and travel, with research reporting WHMs stayed an average of 9.4 months in Australia
- 39.9% WHM jobs are in agriculture and transport, 29.6% WHM jobs were in hospitality and tourism
- WHVs worked 15 weeks per job on average
- Data shows that 21% of WHM will have family and friends visit them during their stay in Australia
- Key markets Germany and UK. Secondary Ireland and France

WHAT CAN YOU DO?

- Aussie Specialist Program (ASP)
- Famils
- Inbound Tour Operators (ITO)
- Visit Us - Marketplace
- Share your story and product updates
- Website



UK PUBLIC RELATIONS UPDATE



SHARING THE STORY OF ADELAIDE & REGIONAL SOUTH AUSTRALIA

PR Objective:

Inspire Brits to find out more about Adelaide and South Australia, motivating them to including our state in their next holiday/ working holiday in Australia

Target Audience:

- High Value Travellers (HVT)
- Visiting Friends and Family Market
- Youth

Strategy: *Share stories which inspire and inform*



CURRENT STATE OF PLAY & MEDIA TRENDS

Media is focused on:

- What's new and quirky (click bait challenge)
- Travel news (new routes/ changes to entry requirements)
- Value for money
- Experience led travel
- Local people and living like a local on a holiday
- Sustainability/ voluntourism/ re-wilding/ citizen-science touring
- Diversity & Inclusion
- Slow Travel





THE COMPETITON

- Hugely competitive out there:
- Other STOs
- Japan – looking to lift restrictions on visitor numbers
- The USA & Canada
- Stand out trending destinations e.g. Costa Rica
- Africa safaris
- Cruise & all inclusives
- Staying closer to homers for now
 - Europe
 - Staycations

MEDIA CONSUMPTION OF TARGET AUDIENCES

HVT audience:

- Consume a lot of TV and radio
- Traditional print media still important
- Research travel forensically online
- Motivated by peer recommendation
- Use Facebook
- Influenced by 'credible celebs' e.g TV chefs, wildlife presenters, news readers, older actors, radio presenters



MEDIA CONSUMPTION OF TARGET AUDIENCES

WHM audience:

- Influenced by parents, peers and brands
- Hugely active on social media and TikTok
- Low consumption of traditional media other than TV



THREE IS THE MAGIC NUMBER

The power of three is as important as ever. For example:

- Three new interesting hotels
- Three new experiences which tie into an emerging trend
- Three new products which weave into a bigger story

...can be enough to convince an editor to commission a story on a region / city

For example in the Barossa:

- Glamover of The Louise & Kingsford the Barossa
- Build of Oscar Seppeltsfield
- Le Mas (opened Sept 2020) now adding six more rooms



KEY MESSAGING FOR SA

- Adelaide as the gateway to the best of Australia
- Wildlife in the wild experiences
- Best food/drink experiences in Australia
- Accessible outback steeped in Aboriginal culture
- Compact state perfect for road-tripping
- Sustainable South Australia and tourism experiences which tie in with that
- Friendly Welcoming Locals





HOW I SHARE YOUR STORIES

- Newsletters / press releases/ proactive and reactive pitching
- Media visits
- Broadcast projects – Australia's South
- Content Partnerships
- Events e.g. Attendance at IMM UK



HOW YOU CAN HELP ME TO SHARE YOUR STORIES

- Send me your latest news and hires imagery
- Add an 'about us' section to your website to help us deepen our friendly/ knowledgeable local locals message!
- Think about developing product which ties in with the current key themes/ trends e.g. adding a citizen science element to an existing tour
- Shout about your sustainability credentials on your website and keep us updated
- emma@emmahumphreys.co.uk



IT'S GREAT TO BE BACK 😊

