The International MARKETPLACE
MARKET OVERVIEW
International visitation in South Australia accounts for 6% of total visitor numbers and 4% of the total nights spent in Australia.
International expenditure accounts for 14% 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 has grown significantly with the addition of Qatar Airways and China Southern Airlines.
Adelaide Airport services 11,800 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 AND FIGURES
Data is based on a 3 year annual average for the years ending Dec 2014 to Dec 2016 for all purpose visitors.

<table>
<thead>
<tr>
<th>Total International Market</th>
<th>Holiday</th>
<th>VFR</th>
<th>Business</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (SA)</td>
<td>228,000</td>
<td>122,000</td>
<td>41,000</td>
<td>43,000</td>
<td>404,000</td>
</tr>
<tr>
<td>Visits (AUS)</td>
<td>3,757,000</td>
<td>2,623,000</td>
<td>864,000</td>
<td>1,359,000</td>
<td>6,947,000</td>
</tr>
<tr>
<td>Nights (SA)</td>
<td>2,237,000</td>
<td>2,887,000</td>
<td>379,000</td>
<td>3,952,000</td>
<td>9,455,000</td>
</tr>
<tr>
<td>Nights (AUS)</td>
<td>76,652,000</td>
<td>63,031,000</td>
<td>10,376,000</td>
<td>91,268,000</td>
<td>241,328,000</td>
</tr>
<tr>
<td>ALOS - Nights (SA)</td>
<td>10</td>
<td>24</td>
<td>9</td>
<td>92</td>
<td>23</td>
</tr>
<tr>
<td>ALOS - Nights (AUS)</td>
<td>20</td>
<td>24</td>
<td>12</td>
<td>67</td>
<td>35</td>
</tr>
<tr>
<td>Expenditure</td>
<td></td>
<td></td>
<td></td>
<td>$859,000,000</td>
<td></td>
</tr>
</tbody>
</table>

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

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

KEY THEMES
- Nature and wildlife
- Food and wine
- Aquatic and coastal
- Outback
- Soft adventure
- Self-drive

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, Tigerair Australia and Jetstar International.

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.
MARKET INSIGHTS (CONT'D)

- 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.

WEB PORTALS

The SATC develops and maintains web portals in each market that partner with wholesalers in each country, motivating consumers and converting interest into bookings. These sites are linked to southaustralia.com and some are in foreign languages.

MULTIMARKET ONLINE TRAVEL AGENTS

There are three global online travel organisations with a reach to over 10 priority markets; Expedia, Priceline Network and Orbitz. Two others have a reach of over 5 markets; Sabre and Odigeo. All own and operate multiple brands, please refer to the last table on the right.

SOCIAL MEDIA

Find our Facebook Page at SeeSouthAustralia. Regional specific pages can be accessed via the SeeSouthAustralia homepage.

The International MARKET PLACE

VISITOR AGE PROFILE

- a 16% • 15-24 yrs
- b 23% • 25-34 yrs
- c 14% • 35-44 yrs
- d 16% • 45-54 yrs
- e 12% • 65+ yrs
- f 14% • 55-64 yrs

ACCOMMODATION USED

- a 34% • Rented house/apartment/unit/flat
- b 34% • Home of friend/relative
- c 12% • Hotel/resort/motel/motor inn
- d 4% • Homestay
- e 4% • Backpacker/hostel
- f 3% • Caravan/camping
- g 9% • Other

TRAVEL PARTY DESCRIPTIONS

- a 54% • Unaccompanied
- b 27% • Adult couple
- c 9% • Family group
- d 9% • With friends/relatives
- e 3% • Business

PACKAGE TOURS

- a 88% • Non package tour
- b 12% • Package tour

FIRST OR RETURN VISIT

- a 41% • First visit
- b 59% • Return visit

This data includes Education and VFR purpose sectors.