CENTRAL EUROPE

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GENERAL MARKET OVERVIEW

GERMANY

- **Population of Germany:** 82.369 million
- Germany is the largest economy in the European Union (EU) and the fourth largest in the world. With the largest gross domestic product (GDP) and the biggest population in the EU, Germany is the most important market in Europe. GDP is €2,407.2 billion (2009)

SWITZERLAND

- **Population Switzerland:** 7.604 million
- Switzerland is an open economy with one of the highest standards of living and one of the highest per capita incomes in the world.

AUSTRIA

- **Population of Austria:** 8.2 million
- Austria, with exports making up a significant proportion of GDP, was hard hit by the global economic crisis. As global demand for Austrian exports fell, Austria's economy declined suddenly in the first quarter of 2009 and by the end of 2009, GDP had fallen by 3.5%.
- Unemployment is expected to remain around 4.8% and inflation at 1.3% in 2010 and at 1.5% in 2011 (Austrian Chamber of Commerce).

MARKET PROFILE

GERMANY

(Source: TA research and statistical reports)

- Visitors to Australia (until end of June 2010): 155,600 (+3%)
- Visitor nights (International Visitor Survey Tourism, Research Australia) fell 5% to 7 million in the year to June 2010 compared with the previous year.
- Outbound travel from Germany has decreased from 79 million in 2000, to 76.6 million in 2009 (preliminary data updated on March 16, 2010).
- Australia ranked 42nd among all outbound destinations and ranked 9th among outbound destinations outside of Western Europe.
- Tourism Australia's current competitor set is defined as the US, Thailand, Canada, South Africa and New Zealand. Australia ranked 4th among competitor destinations (ahead of NZ).

Consumer Trends

- The 15-29 year old segment is the biggest age segment of the German market, representing 46% of total arrivals from the market in year ended June 2010.
- The 50-59 age group also has had the fastest growth in the German market, with an 18% increase for the year ended June 2010 relative to June 2009. The 40-49 age group experienced a decline during the same period (down 25%).
- The leisure segment (Holiday + VFR) is the biggest segment of the German market, representing a combined total of 78% of German arrivals in year ended June 2010.
- German travellers are careful planners, seeking detailed information from a range of sources prior to departure. With increasing travel experience, Germans are not only becoming more demanding, but also more discerning and knowledgeable consumers.
- Germans have historically had longer booking lead times in comparison to European counterparts. The uncertainty caused by the Global Financial Crisis however, led to reduced booking lead times in 2009 as consumers shopped around more in search of the best deal. In 2010, booking lead times seem extreme, with Germans either still hesitant to make long term travel plans and continuing to book short-term (e.g. 2 – 4 weeks prior to travel) or falling back into old habits and booking well in advance (e.g. 6 months or more).
- A study by ReiseAnalyse revealed that the internet continues to gain in importance in Germans' holiday organisation and planning. This in turn causes a slow but constant structural change of the whole complex of organisation and booking. As for booking channels, online portals and accommodation providers are able to increase their share of bookings at the

expense of travel agencies. This is especially due to the steadily improving online booking facilities of accommodation providers, which further encourages the tendency to book single travel services instead of complete tour packages.

- Word-of-Mouth remains as one of the strongest decision factors among Central European consumers.
- The rise of social networking has dramatically changed consumer expectations and behaviour and has impacted the role of travel and tourism organisations. Consumers are in control more than ever before and through the use of these tools, can inform fellow consumers and consequently influence their perception and choice of products. Social networking was one of the fastest growing site categories in Germany in 2009 (28 million unique visitors in December 2009, making it the fifth largest number of social media and blog users globally). Social networking sites, Yasni.de and Facebook.com were Germany's fastest growing sites.
- In a recent report, PhocusWright reveals that the online travel market in Germany grew by 10.4% in 2009 even while overall revenues declined. The German travel market underwent a less severe fall in demand in comparison to other major European markets in 2009.
- Currency exchange rates may have led Germany to usurp the top spot from the UK as the largest of Europe's travel markets in 2009, but deeply-ingrained cultural appreciation for travel is also helping to support German demand as other European markets falter.
- Germany is the third largest European online travel market, but it is expected to overtake France in the next several years as its share jumps from 17% in 2008 to 20% by 2011.
- When making their travel plans, 30.8 million Germans now rely on the internet as a source of information. Of this figure, around 7 million use travel communities as a basis for making a final decision about their journey. A further 5 million intend to rely on these virtual communities for making their travel decisions in the future.
- 97.7% of internet users (representing 42.5 million Germans) have searched for information and/or products online. The most popular searches in 2009 were for holidays or last minute trips, as well as holiday accommodation.

Language

- English is learned as the first foreign language in school. Most German long-haul travellers speak fair English and feel secure enough to travel to Australia.

Annual leave entitlements

- Employees who work a 5 day week are entitled to a statutory minimum of 20 days holiday leave per calendar year. At a 6 day working week, employees are entitled to a statutory minimum of 24 days holiday leave per calendar year (both exclude public holidays).

SWITZERLAND

(Source: TA research and statistical reports)

Consumer Trends

- The 15-29 year old segment is the biggest age segment of the Swiss market, representing 38% of total arrivals from the market in year ended June 2010.
- The 40-49 and the 50-59 age groups experienced the highest increases (up by 36% and 41% respectively) for the year ended June 2010 relative to June 2009.
- The leisure segment (Holiday + VFR) is the biggest segment of the Swiss market, representing a combined total of 81% of Swiss arrivals in year ended June 2010.
- The Holiday and VFR segments have increased significantly for the year ended June 2010 relative to March 2009 (up by 11% and 33% respectively), however the segments Education and Employment have experienced declines during the same period.

Language

- Swiss are multilingual, German, English, French and Italian are widely spoken.

Annual leave entitlements

- Annual Leave Entitlement is 4-5 weeks and Swiss can take up to 3-4 weeks at one time.

AUSTRIA

Language

- Austrians speak German. English is learned as the first foreign language in school.

Annual leave entitlements

- Annual Leave Entitlement is 6 weeks and they can take up to 3-4 weeks at one time.

MARKET TRENDS

- German sellers observed tendencies for late and last minute bookings. One seller commented that the lead time has changed from six to eight months to three to five months. Several sellers also noted the decreasing competitiveness of Australia relative to North American, South American and Asian destinations. Some German sellers noted that while FIT market has held up well, group travel is down. Furthermore, sellers commented that the youth sector held up well, but families and elderly couples have not been so resilient to the economic downturn.
- Trends in German travel still indicate two areas of stable demand and even growth – those who are 'time-rich' (travelling in their retirement) and therefore seek wellness, medical and individual luxury experiences, those who are financially wealthy but time poor, and therefore seek unique experiences, including adventure.
- A group still gaining more and more interest among the travel industry is the 50+ generation. Senior travellers will hail from affluent regions with ageing populations including most developed countries (although rising retirement ages may impede this trend in some countries). Many will be seasoned and vocal consumers of products and services, who will have travelled extensively in their younger days. These people are likely to seek holidays with a specific focus, for example, travelling to see friends and relatives abroad, wellbeing/ medical tourism, learning/cultural holidays and ethical voyages.
- Demand for self-drive experiences and travel packages remains strong in all Central European markets.

Aussie Specialists – Central Europe

As at April 2010, there were 1,551 fully qualified Aussie Specialist agents in Germany with a further 910 agents in training.

MARKET INTELLIGENCE

Competition / Airline Issues

- Tourism Northern Territory and Tourism Queensland remain highly visible in the Central European market with considerably higher budgets ahead of Tourism Victoria and Tourism Western Australia.
- Tourism Queensland received strong media/public interest with their million-dollar PR campaign "Best job in the world". As a result, it has become more difficult to attract consumers to prize raffles and competitions. In October, TQ launched another major-money campaign on Facebook, giving away a $AUD100,000 prize.
- Malaysian Airlines will increase its services to Adelaide from 4 to 5 flights per week starting from March 2011.

Challenges

- Worldwide financial crisis affects consumer behaviour in Central Europe and may lead to a decline in long haul travel plans.
- Ongoing ecological issues with long-haul flights (carbon footprint) on media and political platforms create an "anti-longhaul" atmosphere.
- Airfares remain high in the Central Europe market (due to fuel costs, tax rise, etc.) and add to a negative impact on long haul travel plans. Lack of seat capacities in lower airfare classes among airlines support this situation as capacities are moved away from Australia to more profitable Asia routes.
- Newly introduced flight tax (48 Euro per person per long-haul distance flown) might influence consumer demand, especially among families, to withdraw from long distance holidays.
- USA remains strong in the consumer travel focus, wholesalers have expanded their US catalogues accordingly. This is mainly caused by the favourable exchange rate situation.
- Working Holiday (WHV) makers are confronted by media criticism of a lack of jobs in Australia, and harsh conditions – CE students complain of bad conditions at Aussie schools and universities. This may lead to a decrease in numbers of young travellers.

KEY THEMES / EXPERIENCES PROMOTED IN THE MARKET

South Australia – the 'MUST' first stop down-under when travelling through Australia.

Adelaide – Lifestyle and events city, gateway to various holiday experiences and SA regions.

SA as the Outstanding Nature and Wildlife Destination in Australia – with a strong focus on Kangaroo Island as a National Landscape, Coorong NP, swimming with dolphins and sea lions (focus on Eyre Peninsula), unspoilt natural scenery.

Authentic "pure" Outback – Flinders Ranges/Eyre Peninsula with pure Outback atmosphere and wildlife experience. Strong focus on Coober Pedy and Flinders Ranges as a National Landscape.

Self Drive Destination SA – Explorer's Way, Nullarbor Route, Adelaide-Melbourne Route, 4WD tracks.

SA as the ideal destination for active and eco-orientated holiday: cycling (with focus on Tour Down Under), hiking, diving, golfing – active experiences in an unspoilt environment and impressive landscape; emphasising SA's tourism strategy of sustainable tourism.

Food & Wine – well-renowned wine regions like Barossa, Clare Valley, McLaren Vale and Coonawarra, Adelaide Hills, local produce, multitude of accommodation.

KEY HIGHLIGHTS OF MARKETING ACTIVITIES IN 2009/2010

Neu.de – Online Campaign

Partner: TVIC, TNSW, FTI, Etihad

Competition on dating website "neu.de" (8 million members) in which 3 couples could win a trip to SA/VIC/NSW

Winner couples reported about their trip on the neu.de website via blogs and video Campaign consisted of online element (microsite, videos on special video websites (YouTube, sevenload.de), banner advertising on different websites)

Press Releases from all partners

Target Markets: Young Travellers, Singles & Couples, Age Group 25+

Latest Results: Total media (online) value: 3.5 million AUD; Received PIs for campaign advertising: 250 million; 2 radio spot campaigns with 2 million gross contacts; 39 videos submitted; Approx. 88,000 campaign page visits in 2 months; According to Google Analytics, SA sub page was 3rd most popular page within the campaign microsite (NSW and VIC did not even make it into the 16 most popular subpages); Neu.de Landing Page ranked as 3rd strongest URL for SA.com visit.

Wissen.de – Online Campaign

Partner: SQ, Best-Of-Travel Group, Great Southern Rail

Online promotion on www.wissen.de with editorial/advertorial elements to promote Adelaide as hub for the famous OZ train journeys

Competition to win 3 train journeys (ADL-DRW, ADL-SYD, ADL-PER) as "Train Scout"

"Scouts" to report online about travel experiences after termination of travel (travel date: Sep 2010)

Additional small online prize raffle to gain customer addresses

Special travel package website on Best-of-Travel Group website for South Australia

Documentation of Scout report on SA German Facebook site

Target Markets: Experience Seeker, Active Travellers age group 35+

Latest Results: 79,300 PIs for the Campaign Website until September; 13,669 consumers entered the prize raffle; Newsletter Registrations: 807,279 Applications as Scouts (according to the editors, this was a record participation figure and outran a similar campaign for New Zealand); Traffic increase to SA.com/de by approx. 23%; Wissen.de became second strongest URL to link to SA.com/de.

Knecht Reisen Campaigns

Partner: Knecht Reisen, Tourism Victoria, Singapore Airlines

Target Markets: Experience Seeker, high yield consumers, age group: 35+

Elements & Results: Participation in Consumer Events (SATC participated in 3 major consumer events which saw approx. 3,500 visitors in total; consumer presentations to approx. 450 clients, info stands)

Print Campaign "Holiday Reporter" (post card campaign for prize raffle which featured SATC and TVIC): 14,000 postcards distributed during several big consumer events in Switzerland; 1,700 applications received

Online Campaign with Penfolds "Win a wine cellar": banner ad on 7 high-yield websites;

E-Newsletters (to approx. 47,000 recipients); print newsletter ad (to approx. 35,000 recipients); approx. 4,000 site visits; 2,500 entrances to price raffle; 1,131 newsletter subscriptions

Gay Promotion "Rainbow Reporter"

Partner: Qantas, TUI, Accor Hotels, Queer.de

1-page advertisement in 4 editions of Germany's leading gay magazine "Spartacus Traveller" (25,000 copies, estimated readership: 80,000 minimum) to promote SA Gay Guide (call-to-action: SA website with Download pdf and Boomerang Reisen as distribution WS featured with SA packages); Dedicated article on SA in one edition; 4,000 copies of SA guide as supplement in one magazine edition and distribution of 1,000 copies among Spartacus shops.

Online promotion on leading gay website Queer.de (10 million PI per month) with banners & articles; SA features in monthly newsletters (18,000 recipients)

Target Markets: Gay Travellers, active travellers, age group 25+

Latest results: 1.1 Million PIs for Campaign Site; 3 online advertorials with 26,827 visits; Participation page was viewed by 10,083 readers.

ATE Post VIP Famil

SATC Central Europe office initiated a 4WD famil into the SA Outback for 20 selected European Product Managers and 2 journalists. One group (CE PMs) travelled from Adelaide to Coober Pedy, the other group (UK, Scandi, Benelux) went from CP to Adelaide.

Results: The tour was a major success, as a first result, 6 PMs introduced the product into their catalogues and almost all expressed their interest to increase sales for SA products.

Britz also introduced a new product into SA (4WD Bush Campers for a Tag-Along).

Training Activities / Consumer Presentations

DERTOUR "Reiseakademie"
(Nov 09) – Trade

700 travel agents were trained on SA during the DER mega workshop in Kuala Lumpur. Co-operation with Tourism Victoria.

DERTOUR and Meiers Weltreisen Agent Workshops "Ferngespräch" and "Ferne Länder"
(Jul/Aug 10) – Trade

592 travel agents were trained in total in 6 German cities by the Tourism Australia Trainer as a Destination Australia Partnership (DAP) initiative.

ITB (Mar 10) – Consumer & Trade Show

The SATC CE office attended the travel trade fair (biggest next to WTM/London). Meetings with CE Product Managers and Media. SA collateral was distributed at the consumer section of the Tourism Australia stand.

Consumer Shows 2010
(DAP partnership initiative)

Germany, Switzerland:

Stuttgart (CMT – 206,500 visitors), Zurich (FESPO – 66,700 visitors); SATC brochure distribution at all shows. FESPO/Switzerland: consumer presentations on South Australia to approx. 300 visitors; SA also distributed collateral at several other fairs through WS co-operation.

Corroboree 2010
(DAP partnership initiative)

Germany, Switzerland:

Mega workshop in Melbourne for approx. 100 CE agents (in combination with other European agents), famil group (16 agents) to SA from CE market.

Knecht Australia Day
(May10/Sep 10) – Consumer

Knecht Reisen organized several consumer events with workshops; the events were attended by approx. 3,500 visitors. SATC hosted an info stand and held presentations in front of approx. 450 consumers in total.

Meiers Weltreisen Traveltalk
(Oct10) – Trade

Trade training event by SATC and Meiers Weltreisen. SA presentation for 80 selected best-selling MWR retail agents in 3 major German cities.

Coco Tours Roadshow
(Oct10) – Trade

SA presentation for 180 selected Coco Tours retail agents in 3 major Austrian cities and during a consumer event in Vienna.

PR Activities 2009/10

Media Famils from July 2009 – June 2010
5 individual Media Famils
2 Group Media Famils

13 press releases from July 2009 – June 2010

4 SA news updates from July 2009 – June 2010

Total PR Value July 2009 – June 2010: 10,814574 AUD

12 Aussie Specialist Newsletters from July 2009 – June 2010

Total circulation achieved July 2009 – June 2010:
284.722,067 readers

Editor Tour
15 Media Appointments (Result: 4 famils, 1 big campaign, coverage in several magazines)

ITB 2010
13 Media Appointments

KEY WHOLESALE PARTNERS

There are two major distribution channels for Australian product in the German market; wholesalers who sell their products through travel agencies (chains and independent), and direct sellers who use their own retail offices and partner agencies as their distribution channels.

There are approximately 50 to 60 tour operators selling Australia in Germany, distributing product via wholesale/retail agencies. The major traditional wholesalers selling Australia include DERTOUR, FTI, Meier's Weltreisen, Gebeco, TUI and STA Travel.

Direct sellers are an important feature of the German market, producing a good share of the outbound travellers to Australia. Key direct sellers include Best of Travel Group, Boomerang and Explorer Fernreisen. In addition, some retail agencies have specialised in selling Australia direct. Several direct sell operators are actively growing their agency network throughout Germany and into neighbouring countries including the Netherlands, Switzerland and Austria.

Germany

DERTOUR, BOTG (Best of Travel Group), FTI, Meier´s Weltreisen, Explorer Fernreisen, Boomerang Reisen, Gebeco, TUI/ Airtours, Thomas Cook Reisen

Switzerland

Knecht Reisen, Kuoni, Flex Travel, Dreamtime Travel (BOTG), Australasia (BOTG), Nova Tours, Ozeania, Skytours.

Austria

Jedek Reisen (both BOTG), Coco Tours Weltreisen, FTI, DERTOUR.

ACTIVE INBOUND COMPANIES IN THE REGION

- Australian Outback Travel Company (AOT)
- ATS Pacific
- Wiedemann Travel
- C&E
- Finesse
- Australia One
- Australian Splendour

OPPORTUNITIES FOR OPERATORS

- Become involved in trade and media famils
- ITB participation, held in Berlin, March 2011
- Participation in Tourism Australia New Product Workshop in London
- Participation in Corroboree 2011 (Darwin)
- Provide the SATC office with product updates for inclusion in SA specialist module as part of Aussie Specialist (ASP) Online Training and/or in ASP newsletter
- Advertising on dedicated Australia websites in the CE market, eg. www.australien-info.de, www.weinreisen.de or www.australia.com
- Provide SATC with regular input and imagery for newsletters, press releases and social network info (facebook, twitter)

The best method of maintaining contact with German/Swiss/Austrian wholesalers is to attend the main trade shows such as ATE and ITB (unless you have an in-market rep), to be featured in the SATC Product Manual and to participate in SATC organised roadshows and workshops. Should you plan to visit the wholesalers in their own markets, best timing for Germany would be Feb-May, for Switzerland April (after ITB, before ATE) – larger wholesalers tend to be a bit more flexible. The SATC office in Frankfurt will be happy to assist with co-ordination of sales visits if support is required.

LEADING MEDIA – GERMANY, SWITZERLAND AND AUSTRIA

National daily/weekly Newspapers

Germany: *Bild, Die Welt, Die Zeit, Frankfurter Allgemeine Zeitung, Süddeutsche Zeitung*

Austria: *Österreich, Kurier, Die Presse*

Switzerland: *Blick, Tages-Anzeiger, Neue Zürcher Zeitung, Brückenbauer*

Sunday papers

Germany: *Bild am Sonntag, Frankfurter Allgemeine Sonntagszeitung, Welt am Sonntag,*

Austria: *Die Presse am Sonntag*

Switzerland: *Sonntagsblick and SonntagsZeitung*

Regional daily newspapers

Germany: *Hamburger Morgenpost, Westdeutsche Allgemeine, Berliner Kurier, Frankfurter Rundschau, Münchner Merkur*

Austria: *Kronenzeitung, Salzburger Nachrichten*

Switzerland: *Berner Zeitung*

Travel magazines

Germany: *4-Seasons – Das Globetrotter-Magazin, ADAC reisemagazin, Geo Saison/Geo Special, Abenteuer & Reisen, Holiday & Lifestyle, Merian, Traveller's World*

Austria: *Reise Aktuell*

Switzerland: *ReiseBlick, Globetrotter*

Radio travel programs

Germany: *BR, NDR, WDR, HR, SDR*

Austria: *ORF*

Switzerland: *DRS*

TV travel shows

Germany: *ARTE Voyage Voyage, ARD Ratgeber Reise, N-TV Reise, BR Fernweh, HR Nix wie raus*

Austria: *ORF1 Schöner Leben*

Switzerland: *SF1 Einfach Luxuriös*

General interest/news magazines

Germany: *Stern, Focus, Spiegel, Neon*

Austria: *Profil, NEWS*

Switzerland: *Facts, Saldo*

Special interest magazines

Germany: *Feinschmecker, Fit for Fun, Bike, Essen & Trinken, Schöner Wohnen, Food & Travel*

Switzerland: *Schweizer Familie*

Womens magazines

Germany: *Brigitte, Freundin, Für Sie, Cosmopolitan, Elle, Vogue, Madame*

People's glamour magazines

Germany: *Bunte, Gala*

Austria: *Seitenblicke*

Switzerland: *20 Minuten*

Male interest magazines

Germany: *GQ, Men's Health and ADAC Motorwelt*

Austria: *Auto Touring*

Switzerland: *Motor Kurier*

City and University magazines

Germany: *Prinz, Journal Frankfurt, In München, Go München, TIP Berlin, Zeit Campus*

Corporate client magazines

DB mobil, American Express, Mercedes Benz, BMW and Porsche Magazines

Financial press

Germany: *Focus Money, Manager Magazin, Financial Times Deutschland, Capital, Wirtschaftswoche, Handelsblatt*

Austria: *Cash, Wirtschaftsblatt*

Switzerland: *Bilanz*

TV Guides

Germany: *Hörzu, TV Spielfilm, TV Movie, tv14*

Austria: *TV Media and TV Täglich*

Switzerland: *TR7, Tele*

Online travel channels

www.TravelChannel.de, www.travel24.de, www.marcopolo.de, www.gloobi.de

News agencies

Reuters, DPA-gms-themendienst, srt, AP

USEFUL TIPS FOR WORKING IN THE CENTRAL EUROPE MARKET

Cultural / Trade Issues

- Be mindful of school holidays and seasonal travel pattern to capitalise.
- Germans and Swiss tour operators expect immediate responses to inquiries (especially booking requests). The travel agencies who send an inquiry are under the same pressure as CE customers and expect confirmation of their travel plans within the shortest possible timeframe.
- It is not very common in CE that wholesalers pay for bookings in advance, only deposit payments are accepted in some cases.
- CE customers travel mainly unaccompanied or as adult couples.
- The European Travel Law is very strict. Wholesalers must ensure that hotels, tours and services provided are according to the catalogue description, otherwise the customer is allowed to claim a considerable refund. All info given about your product should be as exact and detailed as possible. If changes occur, wholesalers need to be informed as soon as possible. Wholesalers must provide all travellers with an insurance or bank guarantee as insolvency protection.

Products/Services

- Ensure your product is accessible through an inbound tour operator.
- Send product and rate information, good quality images and brochures with internationally accessible numbers, email and website addresses for international marketing.
- Keep in mind that CE Tour Operators cannot usually use differing rate structures (eg. weekend rates) for their brochures/ catalogues as this is uncommon in the market.
- Be mindful of deadlines for wholesalers' brochure production.
- Provide regular product updates preferably via email or fax for our dissemination into the market.
- Ensure consistent and high quality standards for your products/services.

Distribution

- Identify and know who you are targeting to i.e. DINKS, families etc. and also the type of geographical market (domestic or international)
- Learn about the distribution chain and commission structure – it varies from country to country
- Contact SATC in Adelaide for advice in maximizing the exposure and target audience for your product
- Establish alliances with other operators to do joint marketing
- Ensure you have adequate administrative resources for efficient contact (especially in the case of a sole person operation).