

Key Contacts

South Australian Tourism Commission

Name Neil Saunders
Title Marketing Manager
Email nsaunders@satc.australia.com

Name Odette Smith
Title Marketing Executive
Email osmith@satc.australia.com

Name Jovanka Ristich
Title PR Manager
Email jovanka@independentpr.co.uk

Postal Address Level 6, Australia Centre, Australia House
Strand, London, WC2B 4LG
Telephone +44 207 438 4637
Fax +44 207 240 6690

Name Lachlan Swan
Title Marketing Executive, UK & Central Europe
Location Level 3, 121-125 King William St, Adelaide SA 5000
Email lachlan.swan@tourism.sa.com

Tourism Australia Contacts

Name Ben Janeczko
Title UK Distribution Manager
Telephone +44 (0) 207 438 4612
Fax +44 (0) 207 240 6690
Email bjaneczko@tourism.australia.com

Name Mary Mourgelas
Title Partnership Development Executive - Ireland / Nordic
Telephone +44 (0) 207 438 4610
Fax +44 (0) 207 240 6690
Email mmourgelas@tourism.australia.com

Postal Address Australia Centre, Australia House
Strand, London, WC2B 4LG

Name Rhona Stewart
Title Partnership Development Executive – Netherlands
Postal Address Neue Mainzer Strasse 22, D 60311, Frankfurt/Main, Germany
Telephone +49 (0) 69 2740 0626
Fax +49 (0) 58 2740 0640
Email rstewart@tourism.australia.com

General Market Overview

United Kingdom

- Population: 60,943,912
- Major Cities: London (12 million), Birmingham (2.55 million), Leeds (2,125,000), Liverpool (1.34 million), Manchester (2,475,000), Tyneside - Newcastle (1,060,000)
- The exchange rate is currently (20 Oct 2008) at 0.401 GBP but for most of 2008 until the end of September the rate was steady at 0.46 – 0.48 GBP to the Australian dollar.
- UK GDP growth slowed to 2.5% year on year in the first quarter of 2008, the weakest showing in more than two years.
- The slowdown in first-quarter growth is in line with the Economist Intelligence Unit's expectations, as the international credit crunch has dampened the rate of expansion in the important financial services sector. This is expected to get worse before it gets better over the coming months.
- A breakdown of GDP from the expenditure side is yet to be released, but private consumption growth is projected to slow in 2008-09 as employment demand weakens and households adjust to the tightening of lending criteria and a rise in borrowing costs.
- Consumer demand is also likely to be hit by the sharp slowdown in house price inflation over the past year, the uncertain outlook for the real estate market (prices are now likely to fall this year), and the squeeze on real incomes from higher inflation. This may even lead to a rise in the savings ratio, which has fallen to historically low levels on the back of the debt-fuelled boom in consumer spending (household debt is now estimated to exceed 175% of disposable income).

Visitor Numbers

- Visitor numbers to Australia from the UK, during the year ended 30 June 2008 were 640,100 – 6% decrease on previous year.
- Of the 640,100 that visit Australia, South Australia has 11.5% of the share.
- Total visitor numbers to South Australia from the UK for the year ending 30 June 2008 was 79,100 this was a 3% decrease on previous year.

Consumer profile & trends

- One in every 88 UK residents visits Australia every year.
- Australia's most important international market in terms of economic value is the UK.
- On average UK visitors spend AUD\$5,480 (£2,290) on their trip to Australia.
- On average, English visitors spend 33 nights in Australia.
- Dispersal: 40% of visitor nights are spent outside Sydney/Brisbane/Melbourne/Perth.
- 53% of UK visitors are repeat visitors to Australia.
- The most popular time to travel to Australia is November to March.
- Two thirds of UK adults have taken a holiday abroad or in the UK over the previous 12 months, providing a market in excess of 32 million customers. More people are taking more holidays, but of shorter duration – supplementary short breaks are the prime beneficiary of the new holiday pattern.
- Although year on year arrivals have been down, data indicators are that consumer spend from the UK continues to grow and this is also what the distributors in the UK continue to see as spend by the UK traveller to Australia grows.

Language

English is the official language in the UK.

Annual Leave Entitlements

The minimum for the UK is 20 days plus the bank Holidays, but most companies offer upwards of 23 days. A 25 - 30 day annual leave allowance is quite usual in the UK.

Ireland

- Population: 4.1 million.
- The exchange rate is currently (20 October 2008) at 0.51 Euro to the Australian Dollar.
- GDP growth is expected to slow sharply in 2008-09, mainly because of the ongoing slowdown in the previously overheated property sector. If the decline in house prices were to accelerate, economists believe a recession could be likely.
- There has been very strong growth in Working Holiday Maker (WHM) visa issuance of around 27% in the first seven months of 2007/08. WHM arrivals will provide a balance to effects of weakening in the Irish economy, as the still strong employment market in Australia encourages more working holidays.
- Etihad increased its service to Abu Dhabi from Dublin to six non-stop flights each week from 13 December 2007 and to daily in March 2008.
- America has identified Ireland as a market of growing importance, and now it is the seventh most important inbound market into the USA. The shopping trip to America has become the new 'big thing' for middle class Irish females, claiming that they can redeem the price they pay for the weekend break on the savings they make on purchases. New York accounts for 253,000 Irish visitors – 66% of the market. Visiting friends and relatives accounts for 33% of visits, with the remainder, 66%, holiday visits. The period between January-March is becoming just as popular as the pre-Christmas rush for Irish arrivals into New York.
- The 'open skies' agreement opened transatlantic routes to greater competition from March 2008. The deal allows EU-based airlines to fly from any city within the EU to any city in the US, and vice versa. Increased access to the US from Europe provides further competition to Australian destinations.
- There is some concern surrounding overvalued property prices, and although property prices have fallen, further declines are expected. Given Ireland's dependence on property transaction taxes, and the high level of household debt, and with the decline becoming now more significant there is risk of an economic recession.

Visitor numbers

- Visitor numbers to Australia from the Ireland, year ending June 2008 – 69,100. This represents a 9% increase on the year ending June 2007.

Consumer Profile and Trends

- Australia's eighteenth largest inbound market for arrivals.
- In 2007, the average length of stay for Irish visitors was 47 nights, much higher than the average of 30 nights for all visitors.
- Travellers from Ireland accounted for 2% of all international visitor nights in Australia in 2007.
- Ireland is Australia's fourteenth largest source market in terms of total expenditure. In 2007 travellers from
- In 2007, 29% of Irish visitor nights were spent in dispersed areas, that is outside the major gateways of Sydney, Melbourne, Brisbane and Perth.
- On average Irish visitors spend AUD\$8,306 on their trip to Australia
- Dispersal: 29% of visitor nights are spent outside Sydney/Brisbane/Melbourne/Perth
- 39% of UK visitors are repeat visitors to Australia
- The open skies agreement between the United States and European Union came into effect on 30 March 2008, thus ending limits on which airlines can fly between Europe and the US. It is expected to start a large rise in the number of different carriers flying across the Atlantic, and consequently increased European visitation to the US. Local

carriers, such as Aer Lingus, have launched aggressive marketing campaigns, advertising cheap travel to the US.

Language

English and Irish are the main languages in Ireland.

Annual Leave Entitlements

The Irish have 20 days of leave a year.

Nordic

- Population: Sweden - 9,045,389, Denmark - 5,484,723, Norway - 4,644,457, Finland - 5,244,748
- Exchange rates to the Australian Dollar - Danish Kroner 3.881, Finland Euro – 0.52, Norwegian Kroner - 4.585, Swedish Kroner 5.188, as at 20 October 2008
- Denmark: The government is planning referendums on whether to maintain Denmark's EU opt-outs from defence, judicial policy and the Euro, probably in late 2008. Economic growth is expected to be fairly sluggish in 2008-09. Turmoil in global financial markets means that there are major downside risks.
- Finland: The government has introduced modest tax reductions this year and plans further tax cuts later in its term in office, which will be affordable given the large government surpluses. The Economist Intelligence Unit expects that GDP growth will slow from 4.3% in 2007 to 2.7% in 2008 and 2.4% in 2009. Domestic demand growth will moderate, but remain robust
- Norway: Over the next two years public spending on local government, health, education, research and environmental projects will increase as the government channels an increasing amount of oil wealth into the economy. Inflationary pressures are building as a result of the tight labour market and higher energy and food prices
- Sweden: Over the next two years public spending on local government, health, education, research and environmental projects will increase as the government channels an increasing amount of oil wealth into the economy. Given its sharp rise in recent months, it is expected that inflation according to the EU harmonised measure will rise to average 2.5% in 2008, but easing international commodity prices should enable it to fall to 2.1% in 2009.

Visitor numbers

- Visitor numbers to Australia from Scandinavia, year ending June 2008 – 80,400 (not including Finland)
- Of the 80,400 that visit Australia, South Australia has 13.5% of the share.
- Visitor numbers to South Australia from Scandinavia, year ending June 2008 – 10,400
- This represents an 8% increase from year ending June 2007.

Consumer Profile and Trends

- In 2007, there were 85,720 visitors to Australia, a similar number to the previous year, rating Scandinavia as Australia's fifteenth largest inbound market for arrivals.
- In 2007, the average length of stay for Scandinavian visitors was 39 nights, much higher than the average of 30 nights for all visitors.
- Travellers from Scandinavia accounted for 2% of all international visitor nights in Australia in 2007.
- Scandinavia is Australia's twelfth largest source market in terms of total expenditure. In 2007 travellers from Scandinavia spent a total of \$538 million on trips to Australia, with an average expenditure of \$6,764 per trip.
- In 2007, 50% of Scandinavian visitor nights were spent in dispersed areas, that is outside the major gateways of Sydney, Melbourne, Brisbane and Perth.

- In 2007, December was the peak month for visitors from Scandinavia, followed by February and January.
- In 2007, a total of 52,356 or 66% of visitors from Scandinavia used the internet when planning their trip to Australia.

Language

The main languages in the Nordic region are Swedish, Danish, Norwegian, Finnish and English.

Annual Leave Entitlements

Leave entitlements are between 4 – 6 Weeks for the Nordic region.

Netherlands

- Population: 16,645,313
- The Netherlands has a prosperous and open economy, which depends heavily on foreign trade. The economy is noted for stable industrial relations, moderate unemployment and inflation, a sizable current account surplus, and plays an important role as a European transportation hub.
- Industrial activity is predominantly in food processing, chemicals, petroleum refining, and electrical machinery. A highly mechanised agricultural sector employs no more than 3% of the labour force but provides large surpluses for the food-processing industry and for exports.
- The country continues to be one of the leading European nations for attracting foreign direct investment and is one of the five largest investors in the US. The economy experienced a slowdown in 2005 but in 2006 recovered to its fastest pace in six years on the back of increased exports and strong investment. The pace of job growth reached 10-year highs in 2007.
- Following growth of 3% in 2006 and 3.5% in 2007, the forecast is that GDP growth will decelerate to 2% in 2008 and 1.8% in 2009, partly because of lower export growth, as Dutch trading partners see their economies slow too.
- Higher indirect taxes and commodity prices are forecast to push up inflation from an average of 1.6% in 2007 to 2.1% in 2008 and 2% in 2009.
- Cathay Pacific has extra capacity from the 26 October from Amsterdam to Hong Kong. This is due to the fact that they are changing the aircraft type to introduce the Boeing 747 on this route, resulting in 650 more seats per week capacity.
- According to the latest figures released by Statistics Netherlands, inflation reached its highest level for six years in July, climbing to 3.2 per cent. This is an increase of 0.6 per cent on the June inflation rate. The increase has been attributed to higher gas and electricity prices. After tariffs were adjusted in June, the price of gas rose by almost seven per cent. The Dutch inflation rate is still the lowest in Europe but the difference is decreasing steadily. Inflation in the Netherlands is just over one per cent lower than in other Euro countries.

Visitor numbers

- Visitor numbers to Australia from the Netherlands, year ending June 2008 – 49,900. This represents a 4% increase on year ending June 2007.
- Of the 49,900 that visit Australia, South Australia has 18% of the share.
- Visitor numbers to South Australia from the UK, year ending June 2008 – 9,800. This represents a 13% increase from year ending June 2007.

Consumer Profile and Trends

- In 2007, there were 51,206 visitors to Australia, a similar number to the previous year, leaving the Netherlands as Australia's twenty first largest inbound market for arrivals.
- In 2007, the average length of stay for Netherlands visitors was 46 nights, much higher than the average of 30 nights for all visitors.
- In 2007, travellers from the Netherlands accounted for 1% of all international visitor nights in Australia.
- The Netherlands is Australia's twenty third largest source market in terms of total expenditure. In 2007, travellers from the Netherlands spent a total of \$299 million on trips to Australia, with an average expenditure of \$6,172 per trip.
- In 2007, 53% of nights spent in Australia by international visitors from the Netherlands were spent in dispersed areas, that is outside the major gateways of Sydney, Melbourne, Brisbane and Perth.

Language

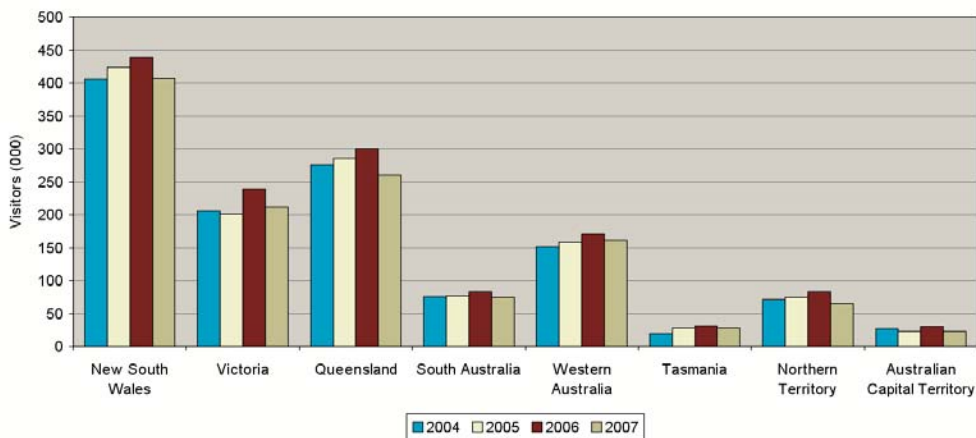
The main languages spoken in the Netherlands are Dutch, Flemish and English.

Annual Leave Entitlements

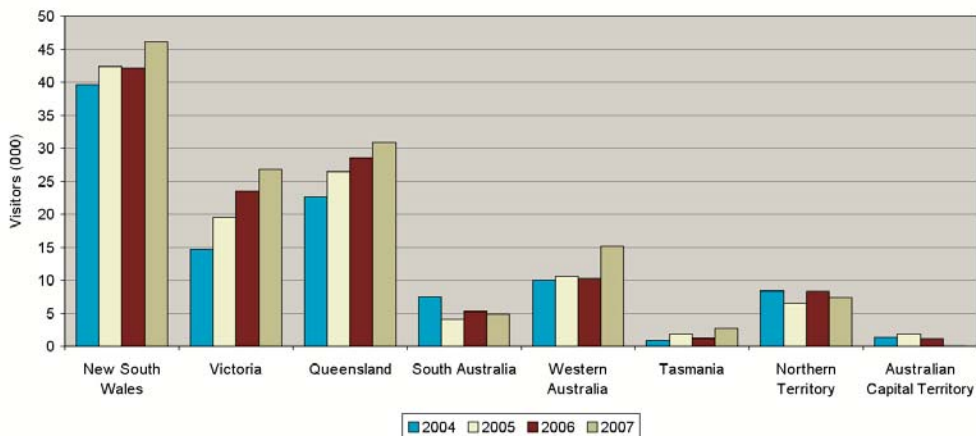
Leave entitlement in the Netherlands is 20 days.

Market Trends

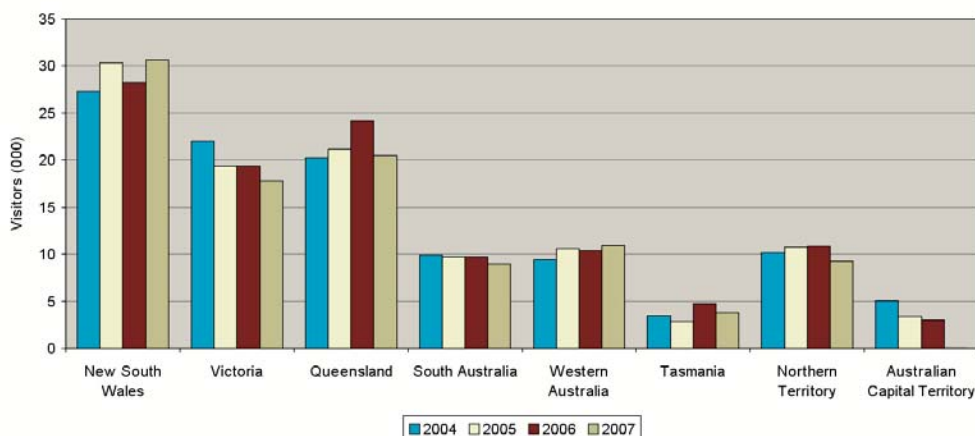
Visitors from the United Kingdom by State/Territory



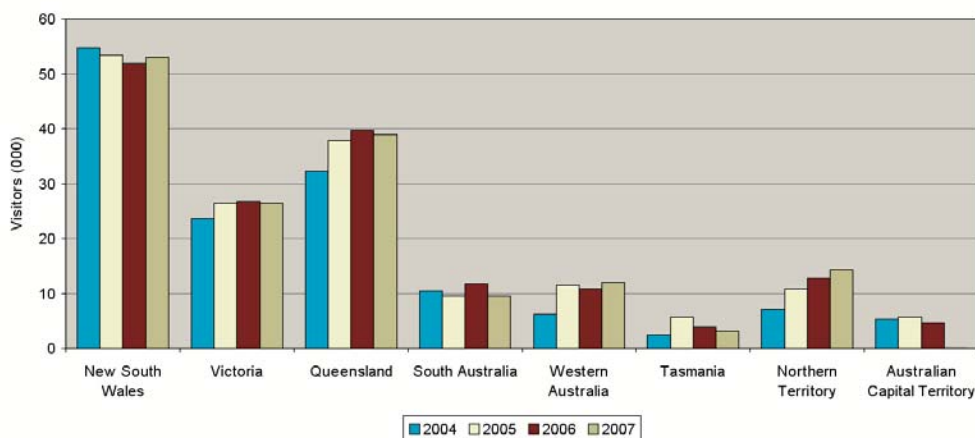
Visitors from Ireland by State/Territory



Visitors from the Netherlands by State/Territory



Visitors from Scandinavia by State/Territory



Key Airlines Flying to South Australia

- Singapore Airlines – Three times daily from London to Singapore. Flights also run from Manchester 5 days per week. Flights to Adelaide from Singapore are daily. Singapore also flies from Copenhagen (Denmark), Oslo (Norway) and Stockholm (Sweden) to Singapore via London and Frankfurt Daily. There are also daily flights from Amsterdam to Adelaide via Singapore. Singapore were the first to fly the A380 beginning in April 2008.
- Cathay Pacific – Four times daily from London to Hong Kong, connecting daily to arrive into Adelaide. UK services only operate from London Heathrow. There are also daily flights from direct from Amsterdam and Daily from Copenhagen & Stockholm via Heathrow.
- Malaysia Airlines – arrives into Adelaide on Tuesday's, Thursday's Saturday's and Sunday's (4 times weekly from Kuala Lumpur). Malaysia flights operate out of London twice daily. Malaysia flies direct from Stockholm (Sweden) to Kuala Lumpur on Tuesdays.
- Qantas Airways – arrives into Adelaide on Wednesday's, Friday's and Sunday's (3 times weekly from Singapore). UK services only operate from London Heathrow, but code shares also exist from Newcastle via London, Manchester via Frankfurt/London, Glasgow via London, Birmingham via Frankfurt and Edinburgh via London.

Competition

- All States and Territories of Australia (excluding Canberra) have representation in the UK. All STO's are co-located at Australia House on the Strand (Tourism QLD only 1 day per week) as part of the Destination Australia Partnership (DAP).
- All STO's are involved in tactical co-op activity within the UK although there is a trend of moving away from co-op trade activity, and towards sole brand/consumer direct activities.
- SATC, TNT, TVIC, work co-operatively within the Nordic market through the travel trade. TQ generally works on single state co-operative marketing activity in the Nordic region. All other STO's provide trade support to Nordic partners.
- SATC, TNT, TVIC work co-operatively in the Dutch Market and again TQ generally run solus marketing campaigns where their RTA's or individual Queensland product buy in.
- TWA are not represented the Benelux or Nordic markets.
- TTAS now have new representation in UK and Europe.
- Competition Worldwide – the number one challenge for all markets is the rise multiple short haul European/North African holidays through the calendar year by consumers (low cost carriers large influence). Long-haul competition Countries. Are South Africa, NZ, USA/Canada, SE Asia, South America.
- The open skies agreement between the European Union and the United States will allow EU based airlines to fly from any city within the EU to any city in the US and vice versa. With this increased access it will provide further competition to Australian destinations.

Key Trade/Company Updates

United Kingdom

TUI – UK: Travelmood, Austravel, Thomson, Trips Worldwide, (Specialist Division) and Peregrine Adventures and OZ experience (Adventure Division)

Now the largest Tour Operator in the UK, TUI – UK has over 250 companies under its umbrella. The key Australian operators are listed above. With the inclusion of Travelmood, as announced in JUNE at ATE, several changes have occurred in the Australian focused companies, which form one group in the Specialist Division. Redmond Walsh the MD who some of you may have met in June, has now left the company. Trips Worldwide no longer runs a Australian Programme, and there is a new Product Manager for the Australia product for Travelmood, Austravel and Thomson. This is Karen Joyce. Please note - Lisa Fitzell, the Product Director, who many of you know, will be leaving the company on NOV 26. Further to this Thomson will no longer produce and sell their own branded Australia product, but will now instead brochure the Austravel Product in their retail stores. As will the First Choice retail chains, bringing over 200 retail outlets on top of the 7 Austravel specialist stores

In the Adventure divisions, Oz Exposure are still looking to expand and we have been working hard on product development for the adventure and backpacker brands. They continue to have a large product gap in South Australia, while recent product development has occurred with Peregrine and their specialist walking and adventure programs in the Flinders Ranges and on Kangaroo Island.

Flight Centre UK

Flight Centre are continuing to develop their land product range - in particular for Australia. With the opening of their flagship 100th UK store in South Kensington, opposite Trailfinders, they are continuing to challenge the traditional Australian travel trade, but increase sales to this region, while several others are reporting lower sales figures. This seems to indicate, and especially in a flat growth market like the UK was last year and

continues to be this year, that they are grabbing market share, and doing it well from their other companies. SATC has had 3 very successful marketing campaigns already and were named Tourist Board of the Year by Flight Centre at the 2008 Annual Awards ball, beating off national tourism offices in the process.

Qantas Holidays

With the arrival of their new MD, Nick Crabb, former Central Europe TA manager, there has been a renewed vigour in marketing plans for the Qantas Holidays. We are still in talks with them for a potential campaign in-conjunction with Qantas.

Stella Group - UK, incorporating Travel 2, Harvey World Travel & Travelbag

It has been a year of consolidation for the Stella group. With changes at the helms of its UK group and also key wholesaler Travel 2 we anticipate a new direction to follow this year, but we will have to wait and see. We have completed a very successful wholesale campaign with Travel 2 and are looking forward to working with them, TA and our other STO partners on the new Australia the movie Outback brochure and campaign.

Gold Medal

It has been a relatively quiet period in terms of marketing with Gold Medal for the SATC. There have been several changes in the product team during the past year. Their air sales for Australia continue to be strong, and we are looking forward to developing a Discover the Other OZ campaign with TVIC and TNT in the New Year. News has also been announced that the company is up for sale and rumors are abound that one of the big two companies, TUI or Thomas Cook, are high on the list to purchase them.

Kuoni UK

Kuoni opened a new flagship retail store in South Kensington, also diagonally opposite Trailfinders and released a new Kuoni brochure with more product, some directly sourced from a PRE ATE famli in South Australia in 2008 by Nicola Denbigh, the outgoing Product Manager for Australia.

She is now set to move to a new position of Contracting Manager within a newly created 'Late Trading' department at Kuoni UK. Jayne White, who is taking up the Product Manager Australia role has been employed as the Product Manager at Kuoni for Switzerland (although she looked after Australia some 7 years ago) and is very much looking forward to returning to the destination. She takes responsibility from Monday November 3rd

ResponsibleTravel.com

Responsibletravel.com is an online web only membership organisation and only promote trips and accommodations that are run in a way that maximises the positive and minimises the negative impacts on the local community, economy and environment. They provide the world's largest selection of responsible/sustainable/eco-travel trips and accommodation. In return they generate high quality booking enquiries, that are driven directly to the people that operate the tours or own the accommodation.

This website goes from strength to strength in providing a viable alternative online search and booking engine for travel. It is relatively cost effective route to market for new businesses and the more established in the UK market. They would welcome more South Australian product, and this would enable us to look at more energetic and integrated marketing campaigns in the future.

Nordic

TUI Travel Nordic - My Planet and Hannibal/Marco Polo

Several recent changes in key personnel over the last year have caused disruption to communication from the Danish Australian Travel giants. Our key Product and Marketing contacts have all moved onto other travel companies in Denmark. We would look to work with the company again this year but are awaiting the announcement of the new Product and Marketing contacts. However before the last changes, the new My Planet brochure produced the greatest range and coverage of South Australian product to date - and their own retail stores continue to sell South Australia well.

Australiareiser/or - Norway and Sweden

SATC continues a strong relationship with key Norwegian and Swedish trade partner Australiareiser. The Managing Director, Rolf Kjeseth has previously worked for My Planet, is a big fan of SA, and has been very supportive and forthcoming in recent successful marketing campaigns in both countries. Rolf is seen as real mover and shaker in the Nordic region and is expected to open a second office in Sweden and to also launch in Denmark very soon. Our recent online and press campaigns have brought about positive results for sales to and within South Australia

ATOL Bound Bookings

It is important that all SA suppliers are ready for the scrutiny from the trade and have the full legal requirements in place (eg Public Liability and OH&S) should their be any accidents, and also ensuring there is no negligence on the part of the supplier.

Also please make yourselves aware of the legal cancellation policy requirements for all your UK trade partners. These will differ from company to company but will follow strict guidelines set by ATOL and other governing bodies.

Key Wholesale Partners

Wholesale / Large Agents - UK

- There are approximately 100 tour operators selling Australia in their programs throughout the UK. A number of these are true wholesalers who offer Australia through a traditional system, relying on retail travel agencies to sell the product contained in their brochures. These include Gold Medal Travel, Travel 2, Kuoni, Qantas Holidays and Bath Travel.
- Direct sellers are another key feature of the UK market and dominate sales to Australia in certain segments, and a large proportion of Australian specialist operators in the UK communicate and sell directly to the public. These include Travelbag, Trailfinders, Travelmood & Austravel (both now part of the TUI group).
- Recent times have seen a rise in retail travel agencies becoming key sellers or tour operators to Australia. These include the Australian retail branches, such as Flight Centre and Harvey World Travel and the large selection of home working retail travel agents, Travel Counsellors.
- The UK market is also seeing a rise in 'web only' Australian search engines, referral sites and retail and tour operators. These include Australian Travel Market, Addicted to Travel, responsibletravel.com and, key 2 holidays.
- A variety of operators specialise in selling travel to Australia targeting specific segments including backpackers, responsible travellers and luxury travellers.
 - STA Travel are the leading backpacker and youth travel specialist for Australia
 - Luxury specialists who promote Australia include Bridge & Wickers, Audley Travel, Turquoise Holidays, ITC Classics, Scott Dunn, Bailey Robinson, Carrier, Cox & Kings, Bales Worldwide, Abercrombie & Kent.
 - And the newest market - responsible travellers including 'voluntourism'.

Active Inbound Companies in the Region

1. AOT
2. ATS Pacific
3. Goway (Self Drive)
4. Australia One
5. Outback Encounter/ Wilderness Australia (for luxury based product)
6. Pan Pacific

Key Themes / Experiences Promoted in the UK/Nordic/Dutch Markets

The key W.O.W. factor, Wildlife, Outback and Wine, has continued to be promoted throughout all markets; it has been used with many campaigns and is used for trade training in all markets.

Wildlife – Under this area we promote Nature and Wildlife as a package, Wildlife as the theme in which we can differentiate ourselves from other States. Number one is the positioning the nature lovers paradise, ‘Australia’s Galapagos’ of Kangaroo Island as a must see for any visitor to South Australia and a must visit destination for a first time visitor to Australia. Other areas heavily promoted under the wildlife experience are the Flinders Ranges and Eyre Peninsula regions. We also keen to point out our ease of access and interaction with wildlife in a responsible manner. Such as swimming with dolphins off the coast of Adelaide; Sealions, tuna or sharks on the Eyre Peninsula: or even holding a koala in Cleland Wildlife Park.

Outback – Promoted as ‘accessible Outback’, or ‘Gateway to the Outback’ this promotes the close proximity of our capital (only 4.5 hours from Adelaide) to the natural treasure of the Flinders, including Wilpena Pound and Arkaroola. However importantly focuses on the indigenous and cultural history and human interest experiences of the Outback, including rock art and interpretation by local aboriginal guides, to Outback pubs and Station Life. The opal mining town of Coober Pedy is also promoted under the Outback, which as a destination combines the human interest and natural attractions as well as being a unique destination.

Wine + Food (Good living) – With 17 wine regions, South Australia is undoubtedly the wine capital of Australia, producing 70% of all of Australia’s exported wines as well as fantastic fresh, local produce. Premium food and wine experiences are promoted as an aspect of all experiences in South Australia. The Tasting Australia event held in Adelaide biennially is a great leveraging tool for this niche food and wine market.

Other key themes promoted include:

Adelaide, South Australia – The focus is on our cosmopolitan good living city which is also the gateway into South Australia and more importantly Australia. A city filled with events and festivals, Adelaidians enjoy great restaurants, cafes, and Central Markets plus the cultural delights of the Aboriginal Cultures Gallery, Tandanya, Jam Factory and National Wine Centre. The ‘20 minute city’ - Adelaide is a beautiful and easy city to explore, from the city centre it’s only 20 mins to the Adelaide Hills or 20 minutes to our amazing metropolitan coast line. Adelaide is the perfect gateway to the many regions of South Australia.

Journeys – The theme of journeys incorporates the not only the great self drive journeys but also the epic train journeys (the Ghan and Indian Pacific) and the amazing Murray River experiences. Adelaide is hub for all these journeys. We promote the use of one of these journeys into their Australian experience; it is a wonderful alternative to internal

flights while encouraging longer stays and regional dispersal. A number of wholesalers in the UK have advised that the Melbourne to Adelaide drive is proving the most popular in their Australia program; this incorporates the Limestone Coast, River Murray and Kangaroo Island regions. The other drives promoted in the Netherlands and Nordic region are, Explorer's Way and the Nullarbor Touring Route.

Key Campaign Highlights

Flight Centre UK (FCUK) – Discover The Other Oz

The 2007/2008 campaign was the first of this nature with FCUK and was extremely successful for South Australia. The campaign ran in 2 stages and we partnered with the 'Discover the Other Oz' team, Tourism Victoria (TVIC) and Northern Territory (TNT). In all DTOOZ campaigns, South Australia promotes itself as the Wildlife State, with secondary focuses on the Accessible Outback and Wine regions. The year on year results were; 14.5% increase on passengers to Australia. For South Australia, Stage 1; provided 6% YOY increase for Air and 10% increase for Land. Stage 2 of the campaign resulted in a YOY increase to South Australia of 35% in Air and YOY, 74% increase to land. The campaign was very successful and we are working with FCUK again in this financial year.

Travel 2

In the January issue of Farout Magazine we had a 4 page feature on South Australia, including front cover. The Farout Magazine is a trade publication, with 5,000 being distributed to the Travel 2 agent database. The article covered our key themes, Wildlife, Outback, Wine and Adelaide as the Gateway. Results taken from the 3 months post magazine launch were very positive, with touring passenger sales up by 30% year on year.

AUDLEY RESPONSIBLE TRAVEL

Partnering with TNSW and TNT our aim was Increase awareness of Australian tourism products distributed and sold by Responsible Tourism operators and pre-empt any perception that long haul travel is environmentally irresponsible. We had a 6 page centre spread in Audley Travel magazine, advertorial in Wanderlust magazine, a micro-site, which will stay up on the Audley site and one month of concerted banner and MPU advertising on key online newspaper and travel sites such as Trip Advisor. Results will take time due the nature of the campaign. It has been developed to be a long term awareness builder and Audley clients tend to plan larger, more in depth itineraries taking longer than the normal to book.

Radio Lynx Content TDU 2008

To showcase how closely PR and the Marketing teams work together in the UK and how a Major event can be linked to Tourism, we undertook an online campaign to promote SA and the TDU each day while the event was taking place in Jan 2008. Each day started with a Tourism lead feature on what to see and do in SA linked with the Days racing. Video was shot and edited to 3 minute news stories that were uploaded in time for 6 AM UK time each day on various website, including the major newspaper sites, Daily Mail and Telegraph. The return on investment was phenomenal with a 270% return recorded. Nearly 100,000 hits to 14 different sites that took the footage resulting in GBP £330,000 worth of coverage.

Australiareiser/or – Norway and Sweden

Multiple campaigns that have been linked with the same themes have been conducted online on key Norwegian and Swedish Newspaper sites. Home page adverts, along with full page advertisements in key weekend newspapers, showcasing South Australian holidays, have brought great sales results and enquiries for the Australiareiser teams. From the online adverts alone there was a 200% increase in enquiries.

Non-Campaign Highlights

South Australian Roadshow – Nordic & UK

It has been 2 years since the last operator Roadshow and this year's program focussed on workshop evenings in place of office visits. The program visited Stockholm, Copenhagen, Manchester, Glasgow and London. In each city a workshop was held, and through these the participating SA operators trained approximately 400 agents. In addition to this a Product Manager lunch was held with key UK and Dutch trade partners. From all feedback received to date, the event was successful and provided great opportunities to establish and build relationships in market.

UK/Europe New Product Workshop March 2008

5 South Australian products showcased their wares to 60 UK and European Product Managers over 2 days at the inaugural UK/Europe New Product Workshop in London. Further to this, all SA products conducted private trainings with both key and potential tour operators pre and post event.

Trade & Consumer Shows

Trade / Consumer shows SATC have participated in since November 2007

PATA Workshops - Copenhagen & Billund, Denmark November 2007

Vakantiebeurs – Utrecht, Netherlands – January 2008

MATKA - Helsinki, Finland – January 2008

Destinations – London – February 2008.

TUR – Gothenburg, Sweden – April 2008

ATE – Perth, Australia – June 2008

Trade / Consumer shows planned for 2008/2009

Luxury Travel Show - London – November 2008

World Travel Market - London – November 2008

PATA Workshops - Copenhagen & Billund, Denmark November 2008

International Luxury Travel Show - Cannes, France – December 2008

Vakantiebeurs – Utrecht, Netherlands – January 2009

MATKA - Helsinki, Finland – January 2009

Destinations – London – February 2009

UK/Europe New Product Workshop - London – March 2009

TUR – Gothenburg, Sweden – April 2009

Corroboree Europe – Australia - April 2009

ATE – Perth, Australia – June 2009

G'day UK – London – June 2009

Major Plans for 2008/09

Flight Centre – Discover the Other OZ

Following on from a very successful inaugural DTOOZ campaign with Flight Centre, we have confirmed another 2 – tiered campaign, with a combination of new element and successful elements from the previous year's campaign. Flight Centre have a new look and feel to their collateral which is more in line with the style that we would like to promote.

- Status: Confirmed, ongoing
- Timing: September 2008 – February 2009
- Region: UK
- Partners: QF, SQ, TNT, TVIC

South Australian Supplements

In line with 'Australia the movie' themes and key South Australian themes we are looking to run several South Australia supplements. These supplements will have a variety of partners and a variety of styles aiming to reach a broad target audience.

- Status: Confirmed
- Timing: Throughout 2008/2009
- Region: UK
- Partners: Travelmood - solely aimed at repeat travellers and 2nd time market. TTG & TA – with DAP partners a 24 page trade dedicated supplement; Wexas & TA (with TWA, TNT and TNQ) - supplement aimed at repeat clients from Wexas who have never been to Australia and second timers; Wanderlust (trade & airline partners TBA) - 32 page supplement due out in Apr 09.

STA Travel – Stars of South Australia

Backpacker/adventure based interactive video and web blog campaign. South Australia will be promoted heavily online to create interest and entries to go in the running to win an ultimate South Australian adventure.

- Status: Confirmed
- Timing: October 2008 – February 2009
- Region: UK
- Partners: STA Travel

Corroboree Europe

For the first time ever, travel agents from throughout the UK and Europe will come together to participate in Corroboree Europe '09, a new and exclusive training event for qualified Aussie Specialists. Corroboree Europe, an initiative of DAP (Destination Australia Partnership), is a result of reviewing and progressing two existing events (Discover Australia and Corroboree UK & Ireland) and will be made up of an Australia wide pre-familiarisation program and training workshop to be held on Hamilton Island. 300 Aussie Specialists from Germany, Austria, Switzerland (x102), Italy (x18), France (x18), Belgium & Netherlands (x12), Norway, Finland, Denmark & Sweden (x10), Ireland (x10) and the UK (x130) will participate in the event.

- Status: Confirmed
- Timing: April/May 2009
- Region: UK, Ireland, Nordic, Europe
- Partners: TA, DAP

UK/Europe New Product Workshop 2009 (DAP)

Under the DAP coalition a 2nd UK/Europe New Product Workshop will be held in March 2009. Each state will be allocated space for up to 4 operators. The mission will be a 3-day in market briefing and workshop. The workshop will allow new product/ or existing product with new elements, to meet with key product managers from the UK, Ireland, Nordic and European markets.

- Status: Confirmed
- Timing: March 2009
- Region: UK, Ireland, Nordic, Europe
- Partners: TA, DAP

Opportunities for SA Operators

UK/Europe New Product Workshop 2009

After a very successful inaugural UK/Europe New Product Workshop in 2008, the event is running again in 2009 and looks set to continue annually. If your product is internationally ready and you are looking to target the UK/Ireland/Nordic/European Markets then this is a great opportunity. Speak to SATC International team or the SATC UK team about participation costs and selection requirement. Keep in mind this is for new product or product that is not already featured in market.

Corroboree Europe 2009

For the first time the German Aussie Specialist event, Discover Australia, and the UK Aussie Specialist event, Corroboree UK & Ireland, will combine and welcome other European markets. The workshop event will be held in May on Hamilton Island, QLD. Prior to the event all agents will famil across Australia, with 3 groups visiting South Australia. Places to present/take a booth at the workshop are limited. It is a fantastic opportunity to train 300 of the top selling agents across Europe.

ATE 2009

ATE 2009 will be held in Melbourne in 2009. This is the largest Australian Tourism Event in the Southern Hemisphere and is a good opportunity to meet with the key international buyers. With its closer proximity to SA we will look to hold famils to attract key product people from the UK/Ireland/Nordic/Benelux markets. Speak to the SATC UK team if you need advice/help regarding appointment scheduling and if you are willing to support the pre-ATE famils.

Upcoming and Potential Famils

Famils are a great way for agents, Product Managers and press to experience product first hand and have proven to be a key element to help increase sales. SATC has a limited budget for trade and media famils and we require significant industry support to assist us with these. Preference for SA suppliers will be given to those operators that provide either FOC or best net price for famil agents.

Brochure Production

The brochure production period for the UK/Ireland/Nordic and Netherlands markets is traditionally August to December. The main brochure distribution starts from December to March, with the start of the new financial year. But it does continue throughout the year - and with the Internet becoming even more important for research and bookings, you need to have a year-round product ready to go.

Deals and Offers

When promoting deals and offers, keep the SATC's UK office informed, as it is good for them to keep this in mind when doing tactical and co-operative marketing with wholesalers.

Product Manual

It is recommended that you purchase space in the SATC's SA Product Manual, given this is the key tool used when offering advice to tour operators for new brochure inclusion within the UK/Ireland/Benelux/Nordic markets.

Australia.com

Advertising on Australia.com is a good medium to reach consumers in our markets. A standard advert is £25 per month. There is a UK subscription of 55,000 consumers, 12,000 in the Netherlands, 700 in Sweden and 300 in Denmark.

SA Self Famil Program

The South Australian Self-Famil Program is a great way to encourage agents to experience your product whilst in Australia on their own break. We believe that this is a cost effective way for you to promote your product to the travel trade.

The Aussie Specialist Programme (ASP)

This is a comprehensive online module training program, designed to help the trade sell Australia and to develop their knowledge on all elements of Australian product offerings. Each of the states and territories have individual training modules that are regularly updated, and SA operators' information can also be included in their monthly SA ASP newsletters. So always make sure all new product or developments with your product is communicated to SATC's Adelaide based UK & Central Europe Marketing Executive, Lachlan Swan, to include in his weekly roundups to the in-market team.

Public Relation Opportunities

Please keep the London team up-to-date with newsworthy changes relating to your product, property or tour, and where possible it will be included in quarterly roundups to trade and consumer media.

Online Marketing Options

With the strong online environment of the UK it is important to be involved, where possible, in what SATC are doing in the online environment. With the launch of the SA.com international site and the Australia Travel Market SA micro site, these are cost effective ways to become involved. We also recommend other online only operators and marketing sites we work with, that can give you another route to market and a chance to reach even more potential clients.

Useful Tips – Working in the UK/Ireland/Benelux/Nordic Market

- As an individual B&B operator you need to work together with other like-minded properties to pull together a 'wholesaleable' package to work with ITOs and enter into the international distribution system. This will need to provide a minimum of 25% commission, confirmation of booking within 24 hours and have similar pricing structures.
- It is a good idea to have a 'dead-end' website detailing your product, so that you are able to display links to wholesalers and vice versa.
- Because the UK is such a large source market to Australia, product and marketing staff are flooded with appointment requests and this is particularly the case in London. Often as a single product it is difficult to get in to train staff – however, a way around this is to come as 2 or 3 products together or do training on behalf of your region. Or work with the SATC when opportunities such as the DAP New Product Workshop or SATC Roadshows are available, which will provide access that you may not have as a sole visitor.
- Likewise with trade training, wholesalers are now very specific with only allowing training with product that is in their current program and at specific times/days, and often they have training booked out well in advance. This needs to be considered before embarking on a general sales trip. A meeting with the product manager is the best step towards being included in the program. Make sure you speak with the SATC UK team before embarking on any in-market visit and if looking to conduct a solo visit please plan as far in advance as possible.
- Whilst food and wine tourism provides greater motivation for the UK market than in France and Germany - it still is only a value-add once people arrive in Australia. A good approach is to work with other international drawcards, such as Kangaroo Island (wildlife) and Flinders Ranges (Outback) in order to package up wine tourism product. Wine and food tourism opportunities are a PR goldmine as well, and this is often the best way for you to get showcased to the UK/Dutch and Nordic consumers. If famil

enquires come your way, do your best to provide as best support - FOC or best rates - you can give, as you will get (9 times out of 10) great coverage in the press and online.

- It is vital for all operators to maintain strong relationships with all of the key inbounders for this market. It is also important that the price is the consistent for the international, domestic and local intrastate market.
- Research shows that a large percentage of passengers from these markets research and book online. Many of the new UK 'online only' operators and referral sites offer a cost effective route to market. They offer all sorts of arrangements from hosting fees to referral commissions, so pick the best one for you. Make sure your own website is up to speed with nice clean images and text for search engine optimisation (SEO) and if you have a direct booking facility on this, it may result in more bookings direct from the UK.
- Responsible or sustainable tourism is becoming more and more important when it comes to consumers' decision to travel - not just in terms of off-setting their travel (which is still at very relatively low levels out of the UK), but more so what they do on the ground once they arrive at their destination. For many it is not about changing what you do, although there will be some elements of this, but more so talking about and publishing what you do in your brochures and on your websites. You want to ensure you let those travellers with a responsible awareness, and the general consumer alike, know what you can do and offer on an environmental, social and economic front. Additionally, it will open many more doors and routes to market via online and less traditional means.

UK / IRELAND / NORDIC / DUTCH PR Activity & Results

JULY 2007 – September 2008

SATC NAME	MEDIA	TRAVEL DATES	WHERE PUBLISHED/PROGRAMME BROADCAST & DATE	ARTICLE	CIRC.	£
HERE & THERE (Norway)		14-16/09/07	HITOG DIT – 01/07/08		162,000	49,000
PETER HARDY		09-12/10/07	DAILY MAIL - 05/01/08		2,327,507	49,896
			www.travelmail.co.uk – still live		0	0
JULIE BAXTER		20-23/12/07	SELLING HAUL/AUSTRALIA Spring 2008	LONG	16,000	3,750
			TRAVELLERS' TALES – Titan Travel		98,000	0
			TRAVELOGUES – Tailor Made Travel		25,000	0
MARTIN THOMPSON		12-17/12/07	FOOD AND TRAVEL magazine - Feb/Mar 08		25,000	36,000
TINA EDISS		16-20/01/08	SUNDAY EXPRESS - 01/06/08		816,351	61,005
			SCOTTISH EXPRESS 01/06/08	SUNDAY	65,000	10,656

SATC NAME	MEDIA	TRAVEL DATES	WHERE PUBLISHED/PROGRAMME BROADCAST & DATE	ARTICLE CIRC.	£
			www.sundayexpress.co.uk June 2008	750,000	0
RADIO (x3)	LYNX	17-29/01/08	99,672 hits on 14 different sites	99,672	332,800
		01/07/08	KI video broadcast on five individual websites	3,945,000	0
PAUL THOMAS		18-23/02/08	EASTERN DAILY PRESS - 10/05/08	64,700	4,656
			EASTERN DAILY PRESS - 24/05/08	64,700	6,200
TRAVEL CHANNEL (x5)		18-29/02/08	“JOURNEY INTO WINE” - June 08 2 episodes, 48 minutes total length, 27 transmissions in 15 languages to 117 countries	172,000,000	1,025,136
XAV JUDD ATTITUDE magazine		22-25/02/08		0	0
SUSAN MANSFIELD		24/2-5/3/08	THE SCOTSMAN – 21/04/08 Interview at Adelaide Festival with Scottish participant Karen Dunbar	49,422	10,710
			www.scotsman.com - April 2008 Interview at Adelaide Fringe with Scottish participant Karen Dunbar	2,822,521	0
			THE SCOTSMAN - 05/06/08 The Adelaide Festival	49,422	10,710
			www.scotsman.com - June 2008 The Adelaide Festival	2,822,521	0
			THE SCOTSMAN – 30/08/08 Wildlife watching in SA	49,422	13,675
			www.scotsman.com - August 2008 Wildlife watching in SA	2,822,521	0
ANTHEA GERRIE		25-28/02/08	JEWISH CHRONICLE - 02/05/08	32,875	6,300
			www.thejc.com - May 2008	0	0
			JEWISH CHRONICLE – 05/09/08	32,875	12,600
			www.thejc.com - September 2008	0	0

SATC NAME	MEDIA	TRAVEL DATES	WHERE PUBLISHED/PROGRAMME BROADCAST & DATE	ARTICLE	CIRC.	£
CIARAN MURPHY THE INDEPENDENT		28/2-2/3/08			0	0
MARK O'FLAHERTY THE INDEPENDENT		12-15/03/08 KI			0	0
MARK O'FLAHERTY HOW TO SPEND IT		21-24/03/08 Adelaide	HOW TO SPEND IT – Financial Times' supplement – 05/07/08		452,930	41,000
MARK JONES/CEDRIC ANGELES BA HIGH LIFE		27/3-2/04/08	BA HIGH LIFE – 01/9/08		200,298	136,700
LYDIA BELL HARPER'S BAZAAR		11-13/05/08	HARPER'S BAZAAR – October 2008		109,146	5,670
JANE MEMMLER DAILY EXPRESS		22-26/05/08			0	0
BRENDA McCORMICK WOMAN'S WAY (Ireland)		23-26/05/08			0	0
SOPHIE GORMAN IRISH INDEPENDENT		07-10/09/08			0	0
TOTAL: 19			46		189,902,883	1,816,464

TA VJP NAME	TRAVEL DATES	WHERE PUBLISHED/PROGRAMME BROADCAST & DATE	ARTICLE	CIRC.	£
TA "ISLANDS" TRIP: DAVID BENNETT	2-8/12/07	GLASGOW 22/03/08	HERALD -	66,795	29,900
TA "ISLANDS" TRIP: MAXINE CLAIRE - IRISH D.MAIL	2-8/12/07			0	0
LUCILLE HOWE	04-07/01/08	DAILY MAIL - 23/01/08		2,327,507	49,896
		www.travelmail.co.uk – January 2008		0	0
		SCOTTISH DAILY MAIL - 23/01/08		128,604	6,300

TA VJP NAME	TRAVEL DATES	WHERE PUBLISHED/PROGRAMME BROADCAST & DATE	ARTICLE CIRC.	£
		IRISH DAILY MAIL - 23/01/08	59,913	7,850
PHILIP NOLAN	16-18/02/08	IRISH MAIL ON SUNDAY - 20/04/08	123,919	18,475
RALPH BESTIC TATLER	12-14/04/08		0	0
WENDY GOMERSALL WEDDING VENUE & SERVICES	23-26/04/08		0	0
LISA YOUNG SCOTLAND ON SUNDAY	30/04-4/05/08		0	0
STANLEY STEWART CONDE NAST TRAVELLER	22-26/06/08		0	0
EOGHAN CORRY TTE IRELAND	25-28/06/08		0	0
NO FRONTIERS RTE	09-13/07/08		0	0
TOTAL: 9		6	2,706,738	112,421

GRAND TOTAL: 29		52	192,709,621	161,421
------------------------	--	-----------	--------------------	----------------

TA VJP - DUTCH & NORDIC: July 07-Sep 08 NAME:	PUBLICATION:	TRAVEL DATES:
IVO WEYEL & HERMAN van HEUSDEN (Dutch)	Four commisisions	25-31/10/07
HANNE HOIBERG (Dutch)	ALT FOR DAMEME	02-08/12/07
NIELS LILLELUND (Danish)	JYLLANDS POSTEN	05-10/03/08
MATTHIJS HESLENFELD (Dutch)	3 commissions	25/3-06/4/08
FRANK van PARIDON (Dutch)	DRINKS ONLY	27-31/03/08
TOTAL: 5		

CONFIRMED MEDIA TRIPS IN THE PIPELINE: NAME:	PUBLICATION:	TRAVEL DATES:
BRYAN APPELYARD	SUNDAY TIMES	09-12/11/08
DAVID WHITLEY	AUSTRALIA & NEW ZEALAND MAGAZINE	31/11-04/12/08
DAVID LEONARD	www.tiscali.co.uk	07-10/01/09
JONA DEKKER & MARIA ELISABETH SCHRAMA	COLUMBUS magazine (Dutch VJP)	02-08/11/08
RADIO LYNX		
TOTAL: 5		

- Total number of press releases written and issued - 52
- Total Audience reached from media visits, press releases and general PR activities - 262,515,530
- Total UK £EAV: from media visits, press releases and general PR activities - £3,579,808