

SATC Industry Forum
Market Update Presentation
Central Europe

November 2010

Market Overview

Economic Overview

GERMANY

- Population: 82.369 million
- Germany is the largest economy in the European Union (EU)
- Germany is the most important market in Europe. GDP is €2,407.2 billion (2009)

SWITZERLAND

- Population: 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: 8.2 million
- Austria was hard hit by the global economic crisis.
- By the end of 2009, GDP had fallen by 3.5 per cent.
- Unemployment is expected to remain around 4.8%
- Inflation at 1.3% in 2010 and at 1.5% in 2011

Market Overview

Consumer Trends

GERMANY

- Visitors to Australia, year ending 30 June 2010: **155,600** arrivals, a 3% increase relative to 2009.
- Visitors to South Australia, year ending 30 June 2010: **30,600** arrivals, a 0% change relative to 2009.
- 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).
- The 15-29 year old segment is the biggest age segment of the German market
- German travellers are careful planners, seeking detailed information from a range of sources prior to departure.
- Word-of-Mouth remains as one of the strongest decision factors among CE consumers.



Market Overview

Consumer Trends

SWITZERLAND

- Visitors to Australia, year ending 30 June 2010: **41,800** arrivals, a 11% increase relative to 2009.
- Visitors to South Australia, year ending 30 June 2010: **8,700** arrivals, a 5% decrease relative to 2009.
- Annual Leave Entitlement is 4-5 weeks and Swiss can take up to 3-4 weeks at one time.
- 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, however the segments Education and Employment have experienced declines during the same period.

Marketing Successes

Neu.de

Partner : TVIC, TNSW, FTI, Etihad

- Online Competition & Radio Spots

Target Markets : Young Travellers, Singles & Couples, age group 25+

Results :

- ✓ Total media (online) value: 3.5 million AUD
- ✓ 250 million Pis for campaign website
- ✓ 2 radio spot campaigns with 2 million gross contacts
- ✓ 39 videos submitted
- ✓ Approx. 88.000 campaign page visits in 2 months
- ✓ SA sub page was 3rd popular page within the campaign microsite (far before NSW & VIC)
- ✓ Neu.de Landing Page ranked as 3rd strongest URL for SA.com/de



Marketing Successes

Wissen.de

Partners :

SQ, GSR, Best-of-Travel Group, Tourism Australia

- Online competition to win 3 train journeys as “Train Scout”
- “Scouts” to report online about travel experiences
- Special SA website on Best-of-Travel Group website

Target Markets :

Experience Seeker, Active Travelers age group 35+

Results :

- ✓ 79.300 PIs for the Campaign Website until September
- ✓ 13.669 consumers entered the prize raffle
- ✓ Newsletter Registrations: 807
- ✓ 279 Applications as Scouts
- ✓ Traffic increase to SA.com/de by approx. 23%;
- ✓ Wissen.de became second strongest URL to link to SA.com/de



PR Successes

Magazin Spezial - Das ist mein South Australia - n-tv Videoportal <http://www.n-tv.de/mediathek/tvprogramm/sendungenaz/Magazi...>

VIDEOS | n-tv LIVE | TELETEXT | PROGRAMM |

TV-Programm Gesichter Sendungen A-Z

Magazin Spezial - Das ist mein South Australia



Das ist mein South Australia

Die nächste „Das ist mein...“ Sendung führt uns in den südaustralischen Bundesstaat. Unsere Reiseführerin ist die beliebte Schauspielerin Sophie Schütt, die selbst einen australischen Reisepass hat und dort auch teilweise wohnt und arbeitet. Wir beginnen unsere Tour auf Kangaroo Island. Dort stehen vor allem die Beobachtung der Tier- und Pflanzenwelt auf dem Programm. Dann besuchen wir die Hauptstadt des Bundesstaates, die Millionenstadt Adelaide sowie die umliegenden Weinregionen. Weiter geht es dann mit Sophie Schütt in das berühmte Outback mit der vollkommen unberührten Natur. Absoluter Höhepunkt für unsere bekannte Reiseführerin ist dann das Schnorcheln mit Delfinen und Seelöwen.

Sendetermine:
Dienstag, 14. Juli um 17:30 Uhr,
Samstag, 25. Juli um 09:30 Uhr,
Samstag, 01. August um 03:45 Uhr
Mittwoch, 05. August um 01:10 Uhr

Weitere Links:
www.southernoceanlodge.com.au
www.australien-info.de
www.singaporeair.com
www.gawlerangessafaris.com
www.southaustralia.com

Gewinnspiel:

Das ist mein South Australia...

- TV Production with popular German actress Sophie Schütt
- 45-min TV documentary on Adelaide, KI and Eyre Peninsula
- additional TV clip about KI
- 14 x shown on private TV channel NTV (620.000 viewers) and 20x on local TV channel Berlin

Results:

- 620.000 viewers for the main documentary
- 480.000 viewers for the KI clip
- more than 10.000 entries for prize raffle
- as a result of the documentary, story was picked up by several magazines and websites



Major Plans - Focus 2010-11



Key Target Segments...

Young Travellers

Experience Seeker

Generation 50+



Major Marketing Projects

Gay Reporter

Fit For Fun Campaign



Major Plans – Focus 2010/11

Fit For Fun
Winners

Meiers
Weltreisen

**Famils,
Famils,
Famils !**

Dertour
Laenderspecial

Corroboree

Key Players – Trade

DERTOUR

Hard to get but consistent partner; no target for niche products!

Meiers Weltreisen

Always open to discussions but mainly interested in products for mature, discerning clients

Boomerang Reisen

Will gain importance as TUI bought in with 49%!

Swiss WS

Limited chance for niche products:
Kuoni, Knecht, Flextravel
Rather go for: Skytours, Ozeania, Dreamtime, Australasia

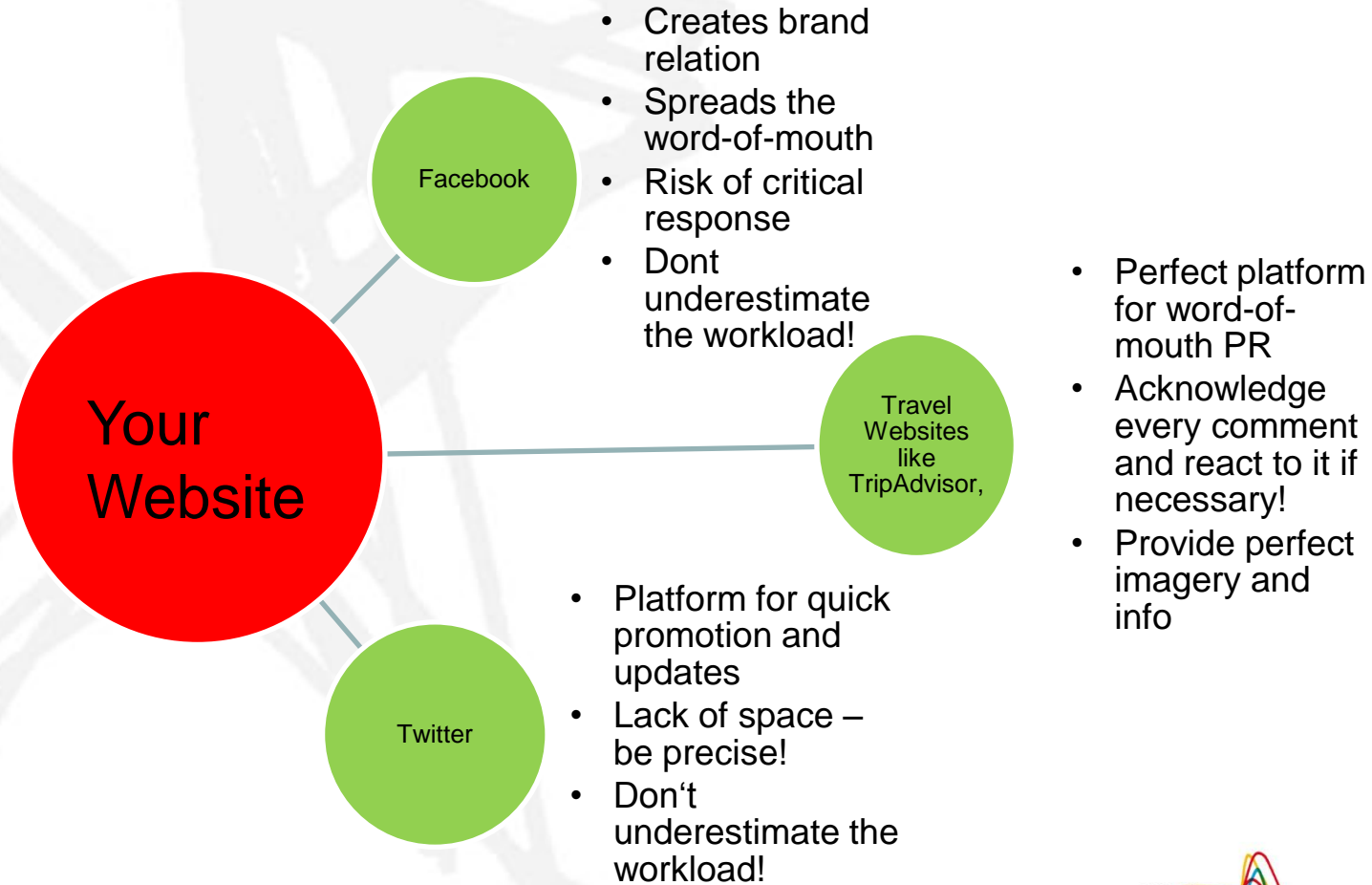
FTI

Very mainstream, no target for niche products; demanding but reliable



South Australia.
A brilliant blend.

Online Environment



South Australia.
A brilliant blend.

Opportunities for Operators

- Corroboree June 2011 (FR/ADL TO)
- DERTOUR Laenderspecial May 2011 (all regions)
- Meiers Weltreisen Famil Feb/Mar 2011 (EP/ADL)
- Fit For Fun Winnergroup Jan 2011 (ADL/AH/FP/KI/FR)
- Newsletters (Trade/ASP/Consumer)
- Facebook Competitions
- www.australien-info.de
- www.weinreisen.de

How you can support SATC's Marketing Efforts

FAMIL SUPPORT

News, News, News....

