

SATC Industry Forum
Market Update Presentation

INDIA

November 2010

India is a **BIG** country

- Population 1.176 billion
- Around 40 cities with a population of more than one million.

India is a **YOUNG** country

- 43% of population under 25
- Will enable economy to keep growing for longer than China.

India is a **COMPLEX** country

- So many different ethnic groups, cultural groups, religions and languages.
- Yet is a robust democracy.

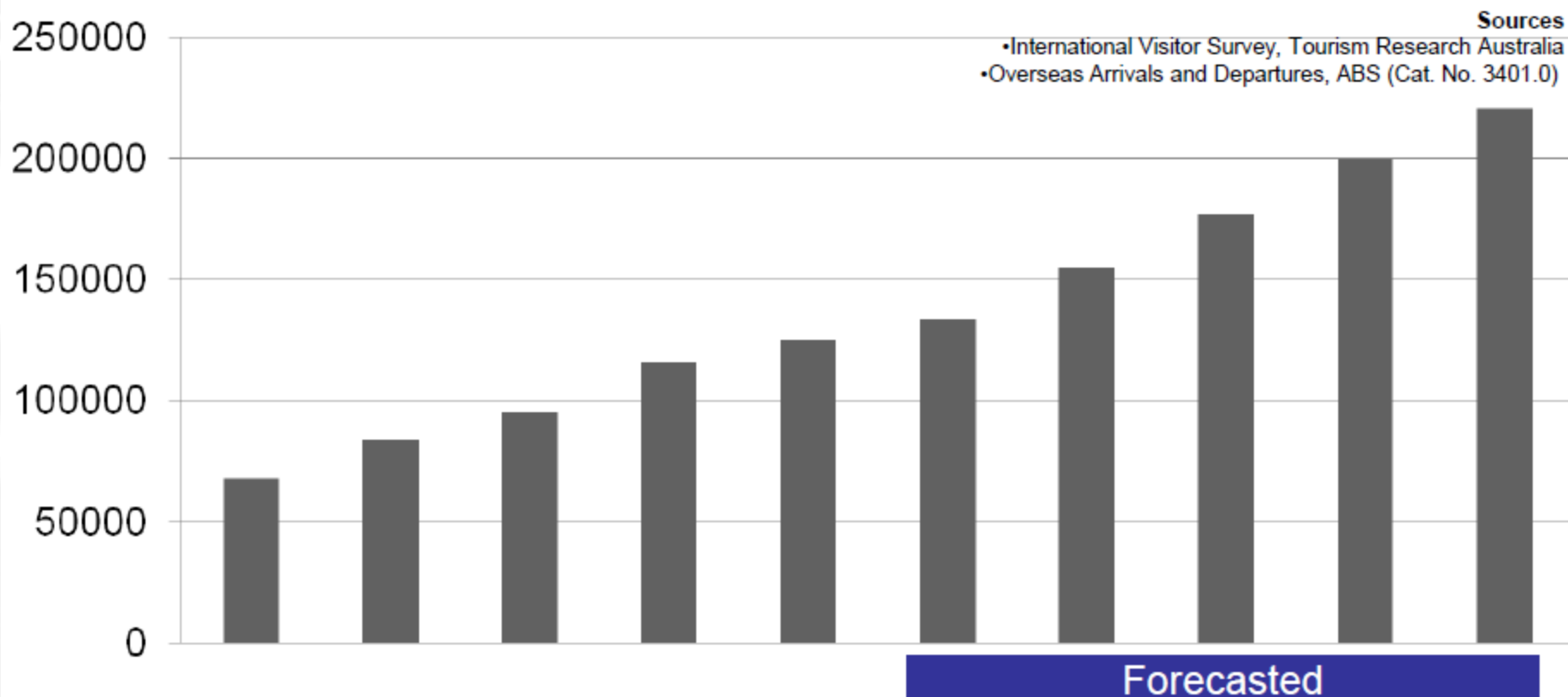


South Australia.
A brilliant blend.

What is happening in the market?

- Economy continues to grow strongly.
- Australia ranks relatively low in terms of destination preference.
- Just under 120,000 visitors to Australia in 2009/10. Just over half are either 'Holiday' or 'VFR' visitors.
- South Australia received a record 5,900 visitors in 2009/10. An increase of 34%.
- 2009/10 was a forgettable year for Australia due to student bashings.
- Tourism Australia have a completely new team in India.
- It is expected Australia will recover quickly and forecasts for visitor growth in the coming decade are very strong.

Indian Travellers to Australia Actual and Forecast (2005 – 2014)



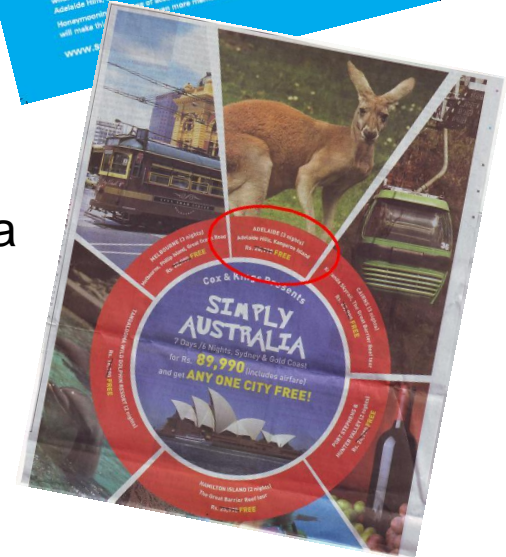
Year2	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Visitors	68000	83800	95200	116000	125000	134000	155000	177000	200000	221000
% Change	22.0	23.2	13.6	21.8	7.8	7.2	15.7	14.2	13	10.5

Activities in the market...

• Brochure tie-ups with key trade partners:

- Cox & Kings
- Kuoni
- Thomas Cook
- Mercury Travels
- In-Orbitz & more....

• Cox & Kings – Online campaign including microsite and EDMs. Adelaide included in a national print media advertising campaign for Australia for the first time.



Welcome to South Australia, renowned for its WOW factor – Wildlife, Outback and Wine! Kangaroo Island's unique wilderness, the stunning, Flinders Ranges and Outback, and the world famous Barossa wine region.

South Australian Experience
06 Days / 05 Nights
Visit Adelaide & Kangaroo Island

Explorer **AUD 950**
Per Person

Call: 1800 22 1235 or 1800 209 04 00
www.coxandkings.com

Adelaide
South Australia

South Australia is all about the good life and it best shows in its world class wine, scenery, people, quality food, nature and wildlife experiences, so choose an unforgettable and a relaxed pace of life.

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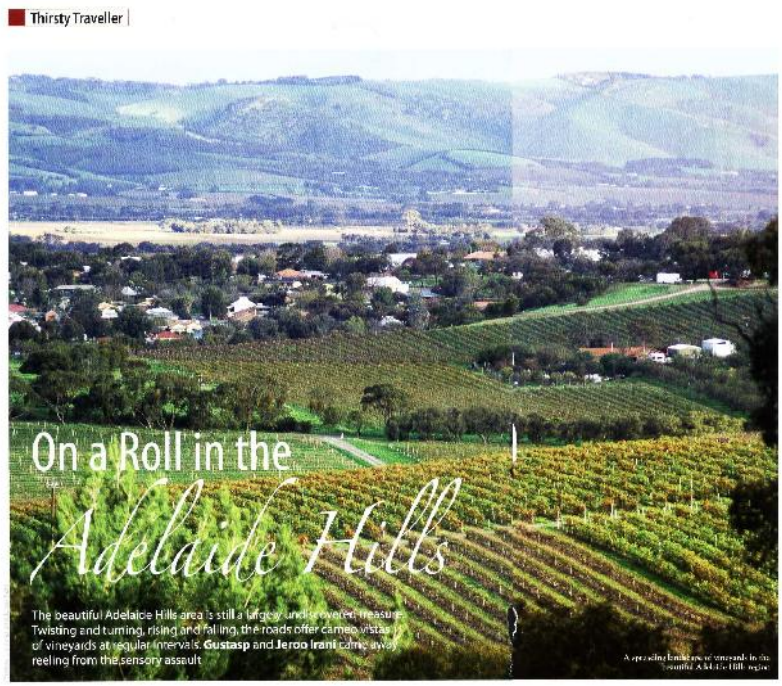
India Travel Mission 2010

- Held in India August 2010
- SATC one of four STO's in attendance.
- 75 buyers attended.
- Tourism Australia launched self-drive and luxury lodge product to the market.



Freelance Journalist Famil – June 2010

- Three freelance journalists visited SA in June.
- Visited Adelaide, Hills, Barossa and Kangaroo Island
- Five stories published in various in-flight and wine magazines. More to come....
- AUD\$100,000 PR value achieved already.



On a roll in the Adelaide Hills, the beauty of the landscape is on full display. The rolling hills, the vibrant green vineyards, and the clear blue sky create a picturesque scene that is truly breathtaking. The Adelaide Hills are a hidden gem, a place where you can truly escape the hustle and bustle of everyday life and immerse yourself in the beauty of the natural world. The Adelaide Hills are a treasure trove of natural beauty, with their rolling hills, their vibrant green vineyards, and their clear blue sky. It is a place where time seems to stand still, and where the beauty of the natural world is on full display.



Major Plans - Focus 2010-11

- Continue working with key trade partners to get greater coverage for South Australia in wholesale programs.
- Running the next instalment of an online campaign with Cox & Kings. This will feature a new and improved micro-site linking directly from the C&K home page.
- Continued hosting of media famils to drive consumer awareness.

Key Regions / Experiences Promoted:

- Nature and wildlife of Kangaroo Island
- Adelaide Oval and The Bradman Collection
- Wine in the Barossa region
- Food and fresh produce throughout the State
- City & Shopping experiences - Central Market, Rundle Mall and Harbour Town
- Self-drive Adelaide – Melbourne
- Luxury Lodges

Key Players – Trade

The Big Three

Wholesale & Retail; Outlets across India; 25% market share; Group & FIT Programs

Cox & Kings

SOTC Kuoni

Thomas Cook

2nd Tier Agents

Aggressive in market; Retail & wholesale; Pan-India; Have potential for specialised product

Mercury Travel

In-Orbitz

Wholesalers

True wholesalers selling to small retail outlets; Some have online consumer direct operations.

JTB Travels

Saltours

Independent Retail Agents

1000s across India; Cater for certain niches; Many also put together own packages

Kesari Tours

Trailblazers

Travel Oytser

Many, many more....

Online Environment

- Trend is to search for information online.
- No Indian specific sa.com - default sa.com in India is our Singapore website.
- Most holidays to Australia booked through traditional travel agents.

Key online players:

Global travel portals – i.e Expedia; Trip Advisor

Indian based online agencies – i.e makemytrip.com;
yatra.com

Websites of traditional agents – Most larger agents
have websites promoting their packages.

Opportunities for Operators

India is an emerging market....

- Trade & media famils are the most likely opportunity.
- ATE East 2011 (and future years)
- India Travel Mission
- Promotion via our Singapore website.
- Various ITO events such as Discover SA.

How you can support SATC's Marketing Efforts

- Prompt responses when contacted for quotes and information by ITOs or Indian Travel Agents.
- Flexibility when hosting famils. Indians will often change plans, be running late or have special dietary requirements.
- Making every opportunity to build relationships with the travel trade as opportunities arise.

Things to keep in mind...

- Most Indians who visit SA will have good English skills.
- Indians have a wide variety of dietary requests. Many are vegetarian. Non-vegetarians often won't eat beef.
- Indians like to eat late dinners – around 9pm or later.
- Punctuality is not the social norm in India so don't be offended if guests arrive late.
- In shops and other places Indians like to touch, feel and pick-up things.
- Indians are used to receiving very high levels of service.
- Indians will often ask very direct questions about things such as family and politics and enjoy engaging in discussion and debate.