

**SATC Industry Forum
Market Update Presentation
UK, Nordic, Benelux**

November 2010



Market Overview

UK

Number one market in terms of economic value to Australia.
Largest Market for South Australia in terms of Visitors.

Mature Market with strong links with Australia (History, sporting & family links). VFR and holiday being the largest reasons for travel.

Earlier in the year, UK visitor numbers dropped due to factors such as, Volcanic Ash, General Election, Airline Strikes.

The UK is a resilient market and will bounce back, youth and luxury ends of the market have been particularly resilient through the GFC.

Market Overview

Nordic

Markets include, Denmark, Sweden, Norway and Finland, visitor numbers for these markets year on year are all positive.

Nordic visitors average spend per person is higher average spend of all inbound visitors.

Benelux

The Belgian and Netherlands markets continue to have a strong interest in travel.

They are highly independent travellers, staying longer and have a very highest level of dispersal than any markets.

90% of this market research online.

Ireland

SATC are no longer active in the market, however we will service training and general trade servicing.



Marketing Successes

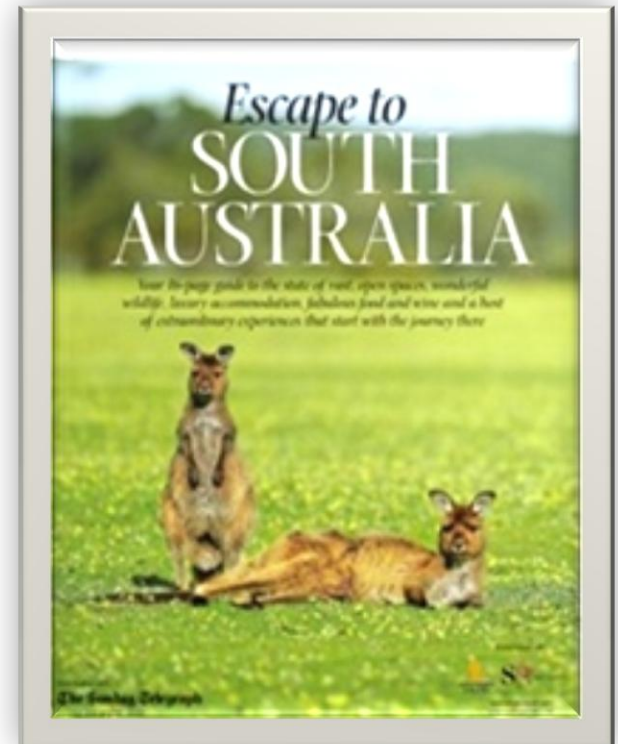
Escape to South Australia with Singapore Airlines

MOU with SATC/SQ in the UK

Consumer Direct, 16 page colour supplement, in the Sunday Telegraph

Replicated online, the site has over 30 million unique visitors per month globally of which over 10 Million per month for the UK.

Circulation – of the print supplement went to of 600,000 through out the UK.



Marketing Successes

Share the Adventure – Working Holiday Promotion

Joint venture between
STA UK/ Migration
Portfolio/SATC

Give away 100 Working
Holiday visas

Amazing results with 149% increase on Flights and 234% increase on surface value.



PR Successes

Ian & Liam Botham's Visit to SA

Resulting not only in national TV coverage in Australia but also coverage in the UK media - Mail on Sunday newspaper and online.

An additional spin off is the fact that we did a Q&A with Botham which appeared in Spin magazine, and we also just got pick up in Esquire magazine of our Botham/Gower Ashes tips release i.e this one.



PR Successes

Sunday Times Travel Magazine – 8 Pages



In addition, Flight Centre and Austravel took out advertising space.



Major Plans - Focus 2010-11

Target Segments

High Yielding, experiences Seekers

Youth, Adventure, gapyear/ WHM market

Key Positioning

Wildlife, Outback, Wine

Adelaide as a gateway

Journey's

Key Marketing Plans

SQ MOU, STA Travel, Trailfinders/Bridge the World

Bridge & Wickers – Luxury focus

Major Plans - Focus 2010-11

Agent Familis

Dutch MH Famil

Nordic Famil

Corroboree Familis

Target PM/VIP for pre/post ATE familis

PR Activities

Ashes/TA Press Famil

STDU

Key Players – Trade

UK

- Trailfinders/ Flight Centre UK, Gold Medal/ Stella UK, STA Travel, Bridge & Wickers/Audley

New to market

- Bridge the World/ Black Tomato (Online - Luxury)

Nordic

- Australiareiser, MyPlanet, Nyhaven, Aktiv Resor, Kilroy, STA

Benelux

- Aussietours, QAS, Kuoni, Pacific Island Travel, ITG –
Werldcontact/Barron

Opportunities for Operators

- Corroboree 2011 – Darwin
- New Product Workshop – 2012
- Responsibletravel.com
- Social Media
- Industry Liaison Manager – Marketing Funds
- Advertising on Australia.com
- Trade/PR Famils
- PR opportunities

How you can support SATC's Marketing Efforts

- Websites, social media
- Keep us updated, newsletters, images, general news
- Support famils, PR and Trade
- Get behind TA/STO initiatives, Famils, New Product Workshops, Corroboree, Roadshows and other initiatives