



Australian Market Profile 2007

Marketing Insights



The Size and Value of the Australian Market

The island of Ireland attracted 127,000 visitors from Australia in 2006, the same as in 2005. Holiday visits decreased by -4% to 82,000 trips, or 54% of total Australian visits to the island. The market showed strong bounce-back in 2004 after the bleak period following 9/11 in 2001 and SARS in 2002, and has struggled to grow on top of this huge growth. Despite slowdowns in visitor and holidaymaker numbers, revenue grew by +6% to €105m/£72m in 2006.

Australian trips to the island of Ireland								
	2000	2001	2002	2003	2004	2005	2006	year on year change
Total Visits (000s)	144	124	109	103	136	127	127	+0%
Holiday Visits (000s)	119	83	68	68	92	86	82	-4%
Promotable Visits (000s)*	120	85	69	70	92	86	82	-4%
Revenue (€m)	N/A	N/A	N/A	N/A	108	99	105	+6%
Revenue (£m)	N/A	N/A	N/A	N/A	75	68	72	+6%

All Australian outbound trips**								
	2000	2001	2002	2003	2004	2005	2006	year on year change
Total Visits (000's)	3,498	3,443	3,461	3,388	4,369	4,754	5,000	+5%
Holiday Visits (000's)	1,565	1,522	1,479	1,462	2,032	2,234	2,350	+5%

*Promotable visits include holidaymakers, conference and incentive visitors and those who come to study English as a foreign language (EFL).

**Outbound trips are trips taken by Australian residents to any destinations outside Australia
Exchange rate used to convert Euro to Sterling is 1 Euro = 0.69 Sterling

Following on from a sluggish start to the Millennium, the Australian outbound market has shown good growth since 2005, with both all trips and holiday trips increasing by + 5% in 2006. Total Australian outbound trips are forecast to reach 8.8 million by 2010.

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- Seasonality of outbound trips
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The Australian market to the island of Ireland

- Why they come
- How long they stay
- Where they visit
- Key facts

Sources of inspiration/information

Download full Australian report

www.tourismireland.com

With an expenditure of US\$11.2 bn in 2005, Australia was **ranked 15th in the world** in terms of spending on travel abroad. Australians spend an average of **€686/£460** per trip on the island of Ireland.

Average length of Australian overseas trips is **22 days**. Trips to **Europe tend to be even longer**, and to include multiple destinations.

The 2001 census found that **10%** of Australians have a **parent born on the island of Ireland**.

Profile of Australian travellers abroad



• Australians get 4 weeks **paid annual leave**. With the introduction of new industrial relation laws in 2006 however, Australians are now permitted to convert up to 2 weeks paid holidays into a **cash payment**.

• Australians are very **price conscious** and a survey conducted by total travel in 2006 found that 39% of them considered price to be a deciding factor when choosing a holiday destination.

• **Europe** accounts for approximately **a fifth** of all outbound trips, and the most popular destinations in Europe are the UK, France, Italy, Austria, Germany, the island of Ireland and Switzerland.

• The majority of travellers to Europe are **independent**, although many purchase a package or group tour as part of their trip.

DREAM DESTINATIONS

NEW ZEALAND
UK

CANADA

ITALY

SWITZERLAND

SWEDEN

ISLAND OF IRELAND

NETHERLANDS

DENMARK

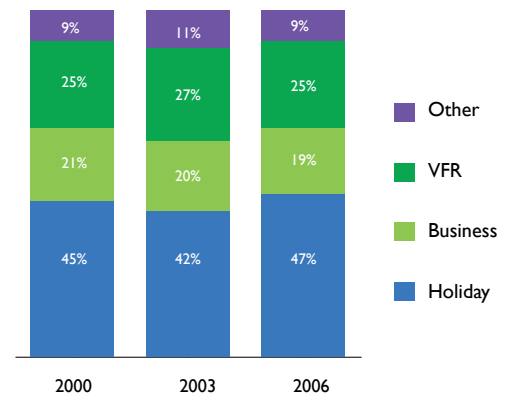
SPAIN

According to the Anholt-GMI Market Brand Index, the island of Ireland ranks 7th as a destination that Australians would love to go to if money were no object.

The Australian Travel Market

Why the Australians travel abroad

In 2006, almost half of all Australian outbound trips were for the purpose of a holiday and a quarter were for the purpose of visiting friends and relatives (VFR). This has remained fairly stable, except in 2003, when following on from world events the share of outbound holiday trips declined, while the share of VFR increased.



Where the Australians go on holidays abroad

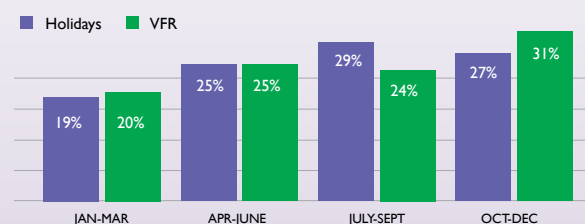
New Zealand, the US and the UK are the three most popular destinations for Australian outbound trips. New Zealand currently accounts for almost a fifth of all trips, while the US and the UK account for 9% and 8% respectively.

	2000		2003		2006		2000 - 2006
	Trips (000's)	share	Trips (000's)	share	Trips (000's)	share	
New Zealand	528	15%	663	20%	865	18%	+2%
USA	395	11%	296	9%	440	9%	-2%
UK	339	10%	313	9%	413	8%	-1%
Indonesia	280	8%	186	5%	195	4%	-4%
Hong Kong	155	4%	115	3%	196	4%	-0%
Singapore	153	4%	124	4%	211	4%	-0%
Thailand	151	4%	128	4%	288	6%	+2%
Malaysia	135	4%	101	3%	168	3%	-0%
Fiji	75	2%	145	4%	202	4%	+2%
China	93	3%	114	3%	251	5%	+2%
Other	1,194	34%	1,202	35%	1,711	35%	+1%

In 2003, following on from world events, the Australians took holidays closer to home in New Zealand, while the US and the UK declined in both trips and share. Indonesia also lost considerable share, and experienced a decline in the number of visits from Australians, due to the terrorist bombings in 2002 and 2005.

Seasonality of outbound trips

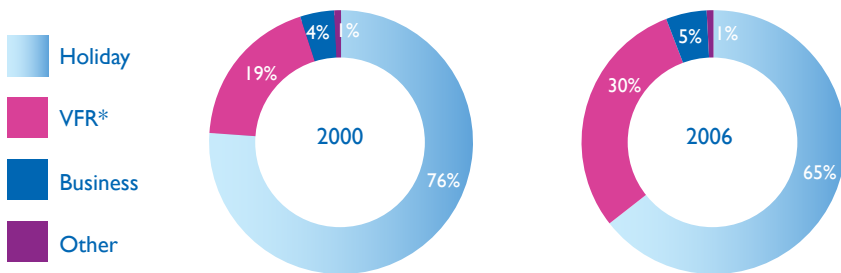
The greatest number of leisure trips were taken during the second half of the year in 2006. The Australian Spring (Oct-Dec) accounted for a slightly higher proportion of VFR trips, particularly December (around Christmas), while the Australian Winter, particularly September, was the most popular time for taking holiday trips.



The Australian Market to the island of Ireland

Why they come to the island of Ireland

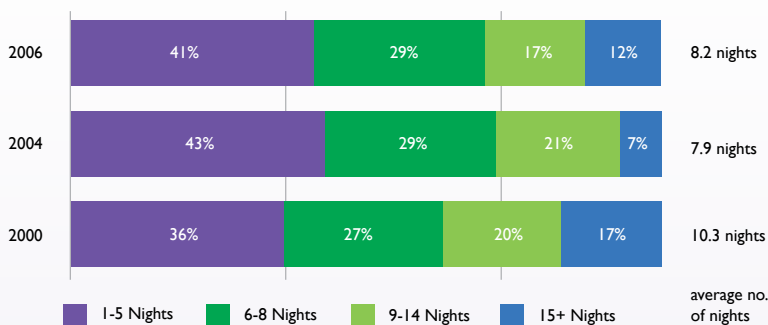
The purpose of visit of Australian visitors to the island of Ireland has changed considerably since 2000, when more than 3 out of every 4 visitors were here for a holiday (76%). In 2006 65% were here for a holiday and 30% were here for VFR. The increased migration between Australia and the island of Ireland and the tendency for "just-out-of-college" students to spend a year in Australia has most likely impacted on the trend towards more VFR visits.



*Visiting friends & relatives

How long they stay on the island of Ireland

Australia gives the island of Ireland some of its longest staying holidaymakers, and in 2006 the average length of stay was 8.2 nights. Due to their geographical distance from the island, Australians tend to stay longer to maximise holiday time and see as much as possible in one trip.



It is probable that over 70% of holidaymakers are on a multi-destination trip (i.e. visiting other destinations outside the island of Ireland), as 70% of trips are for 8 nights or under, and with the average Australian trip to Europe over 3 weeks long, it is unlikely that one would travel all the way from Australia for a holiday of just 8 nights.

Where they go on the island

Again, as the Australians have travelled so far, as well as being amongst our longest staying holidaymakers, Australians are also the most likely to visit multiple areas around the island. In 2006 each holidaymaker visited an average of 3.35 of the 8 areas.

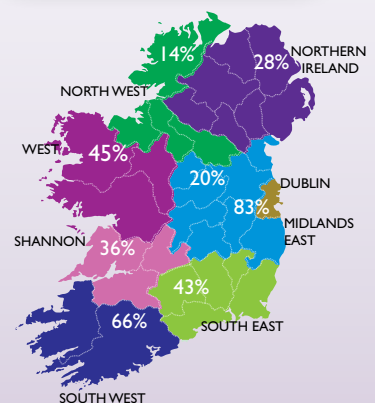
Dublin is the most popular area, with 83% of all holidaymakers overnighing there. The South West is also included in most visits, with two thirds of all holidaymakers spending at least one night in the area. Northern Ireland formed part of the itinerary for 28% of all Australian holidaymakers on the island in 2006.

Holiday-Areas Visited (%)	2000	2002	2004	2006
Dublin	79	84	87	83
Midlands East	29	23	19	20
South East	53	34	32	43
South West	60	53	57	66
Shannon	35	31	35	36
West	43	39	48	45
North West	14	8	14	14
Northern Ireland	19	17	22	28
Average no. areas visited	3.32	2.89	3.14	3.35

Profile of Australian travellers on the island of Ireland

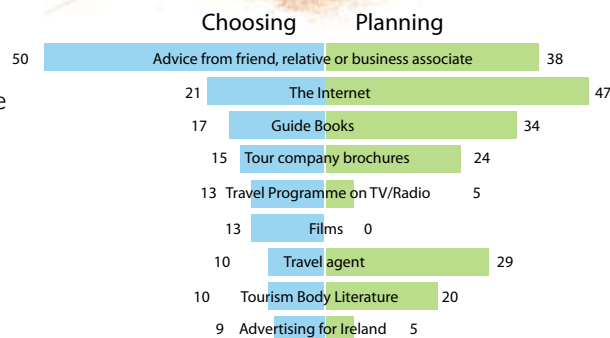


- Over **two thirds** of Australian holidaymakers arrive between **May and September**.
- In recent years there has been an increase in the numbers booking at least part of their holiday without a travel agent. In 2006 **85% booked independently**.
- **Guesthouses and B&Bs** are the most popular accommodation choice and over **35%** of holidaymakers used them in 2006.
- In 2006 almost **30%** said that their holiday had **exceeded their expectations** and 62% said it matched their expectations.
- Over time the island of Ireland is attracting a slightly **older holidaymaker** from Australia, with more arriving from the C2 social class (18% in 2006), although the vast majority are from the **ABC1 social class**.



Sources of Information/Inspiration

Advice from friends and relatives remains the most popular inspiration source for Australians choosing the island of Ireland as their holiday destination. Over a fifth (21%) were inspired by the Internet, while almost half (47%) went online for information at the planning stage. Australia holds the position as world leader regarding online travel buying and 71% of Australians have Internet access. Guide books are also very popular with Australians and over a third used them in 2006 when planning their trip. 29% still use a travel agent when planning their holiday.



The full Australian report contains over 100 pages of invaluable information. Everything you need to know about Australian visitors to the island of Ireland and how to avail of promotional opportunities **with Tourism Ireland in the market place.**

Contents of the full Australian report can be downloaded at www.tourismireland.com

Country Profile:

Background information on the country.



Australia travel profile:

Statistical information illustrated by charts including size of market and profile of general outbound holidaymaker.



The Australian market to the island of Ireland:

Detailed breakdown including the size of the market and the profile, motivations and attitudes of holidaymakers visiting the island.



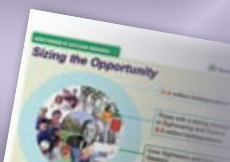
Car touring to the island of Ireland:

A brief synopsis of the car touring market to the island of Ireland in general (not only Australian visitors).



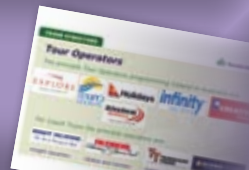
Sightseers and Culture Seekers:

As Tourism Ireland's key target segment in 2007 this gives an overview of who they are and what messages motivate them.



Trade Structure:

How the trade operate on our behalf in the market place.



Tourism Ireland Activities:

Lists all advertising and promotional activity in the market along with cooperative opportunities.



Tourism Ireland Contacts:

Details of who's who in the Australian office.



Market Profiles are also available for Great Britain, USA, France, Germany, the Netherlands Italy, Canada, Spain and the Nordics



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