

INTERNATIONAL MARKET PROFILE NEW ZEALAND

MARKET OVERVIEW

- ▶ New Zealand is South Australia's fourth largest inbound market.
- ▶ High yield experience seekers (not yet retired) travelling without children who like to disperse into the regions.
- ▶ A secondary market includes retirees who are still high yielding and independently affluent, aged 65+ years and who tend to stay longer.
- ▶ The visiting friends and relatives (VFR) market is important, and there is also an emerging market of younger professionals looking for quality food and wine, and events.
- ▶ Key experiences include the Murray River, food and wine, self-drive journeys and vibrant Adelaide city.

FAST FACTS & FIGURES

Data is based on a 3 year annual average for the years ending Dec 2016 – Dec 2018 for all purpose visitors.

NEW ZEALAND	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	18,000	14,000	7,000	3,000	39,000
Visits (AUS)	469,000	586,000	222,000	159,000	1,237,000
Nights (SA)	124,000	124,000	37,000	113,000	399,000
Nights (AUS)	3,681,000	5,841,000	1,146,000	3,026,000	13,694,000
ALOS - Nights (SA)	7	9	5	38	10
ALOS - Nights (AUS)	8	10	5	19	11
EXPENDITURE					\$52,000,000

APPEALING EXPERIENCES

- ▶ Adelaide's vibrant bar and restaurant scene, abundance of local produce and cultural precincts act as the perfect gateway to the regions.
- ▶ Adelaide and surrounds offer quality food and wine experiences, aquatic wildlife and beautiful coastline.
- ▶ Premium food and beverages and 'destination dining' in scenic or unique locations across the state continue to rise in popularity – to the point where this has become a primary purpose of travel.
- ▶ River cruising and houseboating on the Murray River, historic riverside townships and food and wine.
- ▶ Southern Ocean Drive (Melbourne to Adelaide touring route incorporating Limestone Coast).

TARGET MARKET PROFILE

- ▶ High yield experience seekers aged 35-65 years (not yet retired) travelling without children and spent more than \$2,000 on their last trip.
- ▶ A secondary market includes retirees who are still high yielding and independently affluent, aged 65+ years and who tend to stay longer.

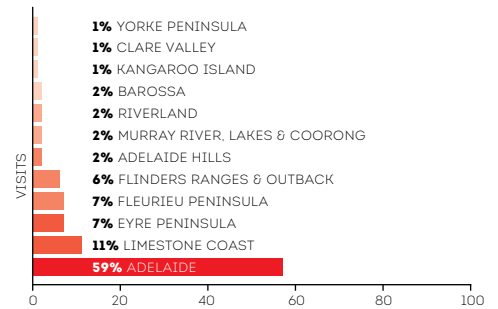
KEY THEMES

- ▶ Murray River
- ▶ Food & wine ('destination dining')
- ▶ Self-drive
- ▶ Events

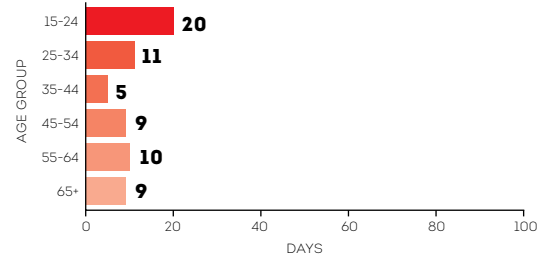
AIR ACCESS

- ▶ Air New Zealand provides direct access into Adelaide from Auckland four to six days per week seasonally. The new Dreamliner aircraft services the route on all flights as of October 2018

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

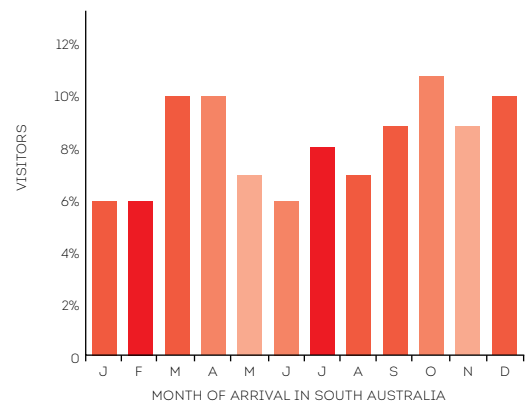


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



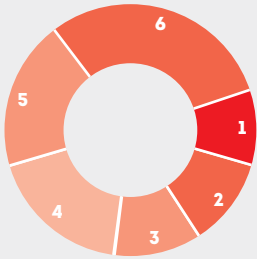
*Average length of stay is influenced by longer staying education and VFR sectors

SEASONALITY



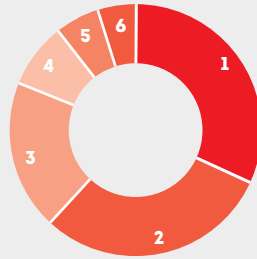
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VISITOR AGE PROFILE



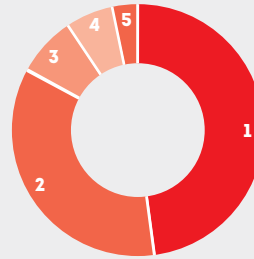
- 1 15-24 **9%**
- 2 25-34 **12%**
- 3 35-44 **11%**
- 4 45-54 **18%**
- 5 55-64 **20%**
- 6 65+ **30%**

ACCOMMODATION USED



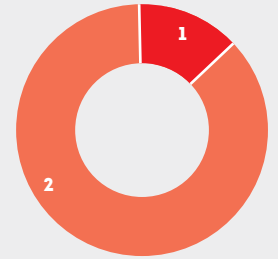
- 1 Home of friend/relative **32%**
- 2 Hotel/resort/motel/motor inn **29%**
- 3 Other **21%**
- 4 Rented house/apartment/unit/flat **9%**
- 5 Caravan/camping **5%**
- 6 Backpacker/hostel **4%**

TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied **48%**
- 2 Adult couple **35%**
- 3 Family group **8%**
- 4 With friends/relatives travelling together **6%**
- 5 Business **3%**

PACKAGE TOURS



- 1 Package tour **12%**
- 2 Non-package tour **88%**

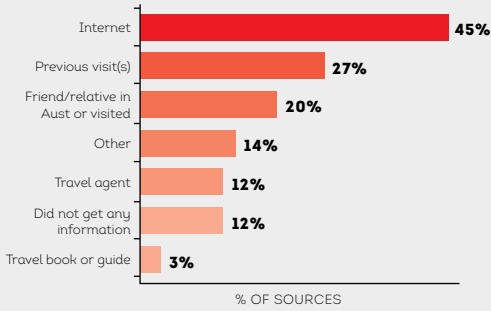
MARKET INSIGHTS

- ▶ A strong focus remains on driving consumer demand through strong branding activities via TV, digital and PR platforms. Key calls to action are driving visits to www.southaustralia.com where Kiwis can engage with South Australia content and link to booking partners.
- ▶ The South Australian Tourism Commission (SATC) continues to develop its strong relationship with Air New Zealand, working to drive passenger numbers to South Australia.
- ▶ The SATC works closely with key travel trade partners to ensure South Australian holiday packages and deals are regularly promoted to Kiwi holiday planners.
- ▶ New Zealand travellers are quite comfortable booking and travelling independently, therefore the SATC contributes a significant proportion of its marketing budget towards consumer direct marketing.

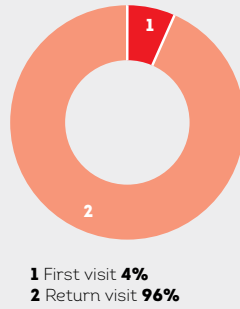
- ▶ New Zealand travellers seek experiences different from those available to them in their home country. For example, culinary/wine experiences incorporating historic buildings and local culture, houseboating and river cruising on the Murray River.
- ▶ Most New Zealand consumers will research and book holidays to Australia online, therefore a quality website is vital.
- ▶ Kiwis are unlikely to look past the first few pages of online search results, so it is crucial to optimize search engine rankings.

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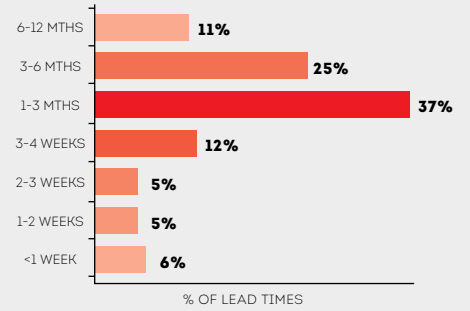
INFORMATION SOURCES



FIRST OR RETURN VISIT



BOOKING LEAD TIMES



KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
GO HOLIDAYS	HELLOWORLD; THE TRAVEL BROKERS, LIFESTYLE HOLIDAYS, NZ TRAVEL BROKERS
INFINITY HOLIDAYS	FLIGHT CENTRE; WORLD TRAVELLERS
HOUSE OF TRAVEL PRODUCT	HOUSE OF TRAVEL
LIFESTYLE HOLIDAYS	FIRST TRAVEL GROUP; YOU TRAVEL

CONTRACTING & BROCHURE TIMES

Contracting generally begins around August each year with brochuring for South Australia taking place around November/December each year. These dates may vary slightly between wholesalers.

TOP TRAVEL WEBSITES

AIR NEW ZEALAND	YAHOO TRAVEL
TRIPADVISOR	WOTIF.COM
STUFF.CO.NZ TRAVEL	WEBJET
EXPEDIA	FLIGHT CENTRE
HOUSE OF TRAVEL	NZHERALD.CO.NZ TRAVEL

SOCIAL MEDIA

Find our Facebook page at [SeeSouthAustralia](#)

CONTACTS

MARKETING

MARTIN KAESLER
MANAGER, WESTERN MARKETS
MARTIN.KAESLER@SA.GOV.AU

DISTRIBUTION

TRADE@TOURISM.SA.COM

Source: International Visitor Survey Dec 16, Dec 17 & Dec 18 conducted by Tourism Research Australia. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2016 to Dec 2018. Totals may not add to 100% due to rounding. np = not published due to small sample size. VFR = Visiting Friends and Relatives, ALOS = Average Length Of Stay (Nights). Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia. Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete or suitable for the purposes for which you wish to use it. By using this information you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information. Produced by the South Australian Tourism Commission April 2019.

