

INTERNATIONAL MARKET PROFILE NORTH AMERICA

MARKET OVERVIEW

- ▶ North America (USA and Canada) is South Australia's second largest inbound market.
- ▶ North American visitors are high yield experience seekers and are time poor. They have high median household incomes and have travelled internationally in the last three years.
- ▶ South Australia offers passionate characters that bring to life our world class wildlife, outback and wine (referred to as "WOW") experiences.
- ▶ The North American market is beginning to venture outside of Adelaide and Kangaroo Island with the Flinders Ranges & Outback, Eyre Peninsula and self-drive journeys being promoted and brochured via major wholesalers.
- ▶ Overall travel statistics indicate that Canada represents about 17% of North American volume, and a slightly lower proportion of revenues.

FAST FACTS & FIGURES

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

NORTH AMERICA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	39,000	21,000	11,000	5,000	70,000
Visits (AUS)	489,000	320,000	148,000	173,000	875,000
Nights (SA)	310,000	313,000	133,000	342,000	1,097,000
Nights (AUS)	7,314,000	5,382,000	1,764,000	4,559,000	19,018,000
ALOS - Nights (SA)	8	15	12	68	16
ALOS - Nights (AUS)	15	17	12	26	22
EXPENDITURE					\$102,000,000

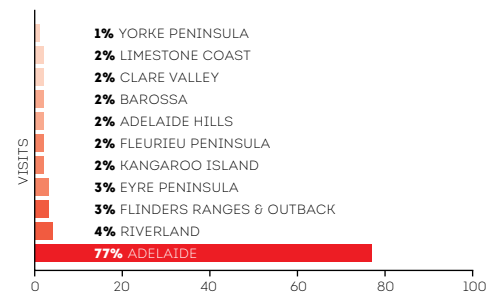
APPEALING EXPERIENCES

- ▶ Wine and food, outback and wildlife (in the wild) are the predominant themes which appeal to this market.
- ▶ Adelaide acts as a hub for the regions. Unique attractions such as the boutique laneway precincts, iconic Adelaide Oval and world-class dining options are appealing.
- ▶ Kangaroo Island offers diverse and intimate encounters with wildlife in the wild. This is a primary purpose of visitation to South Australia
- ▶ The Fleurieu Peninsula, (including the McLaren Vale wine region), Adelaide Hills and Barossa provide food and wine, natural experiences, landmark restaurants, landscapes and charismatic personalities.
- ▶ The Eyre Peninsula is attracting positive interest from media and trade for its coastal aquatic, adventure, wildlife, and seafood experiences.
- ▶ The wildlife and geographic attractions of the Flinders Ranges & Outback are of interest to those with longer itineraries, including indigenous tours and history of the regions.

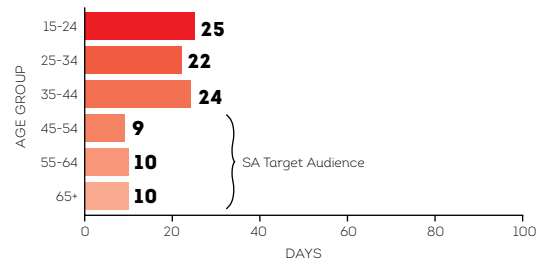
KEY THEMES

- ▶ Soft adventure
- ▶ Food & wine
- ▶ Coastal
- ▶ Nature & wildlife
- ▶ Luxury

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

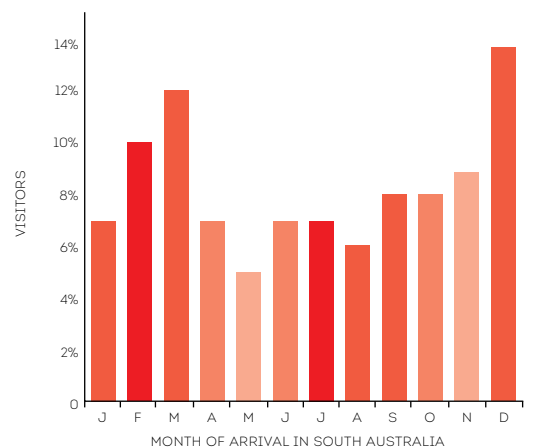


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

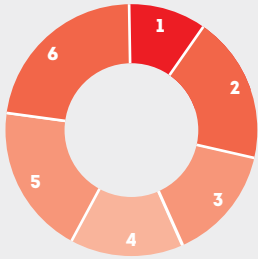
SEASONALITY



INTERNATIONAL MARKET PROFILE NORTH AMERICA

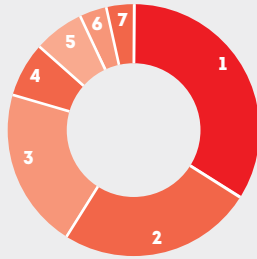


VISITOR AGE PROFILE



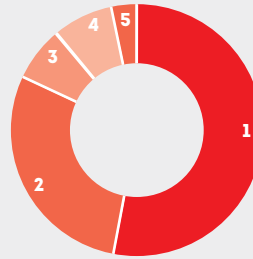
- 1 15-24 **10%**
- 2 25-34 **19%**
- 3 35-44 **15%**
- 4 45-54 **15%**
- 5 55-64 **20%**
- 6 65+ **23%**

ACCOMMODATION USED



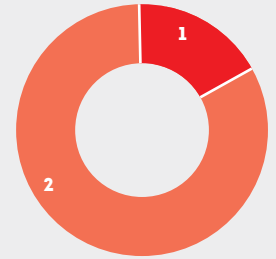
- 1 Home of friend/relative **34%**
- 2 Hotels and similar accommodation **24%**
- 3 Rented house/apartment/unit/flat **21%**
- 4 Homestay **6%**
- 5 Other **8%**
- 6 Education institution (University / school dormitory or college) **3%**
- 7 Other **3%**

TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied **53%**
- 2 Adult couple **29%**
- 3 Family group **7%**
- 4 With friends/relatives travelling together **7%**
- 5 Business **4%**

PACKAGE TOURS



- 1 Package tour **16%**
- 2 Non-package tour **84%**

TARGET MARKET PROFILE

- ▶ **Affluent experience seeker:** This market segment is generally older couples who share a passion for nature, adventure, food and wine and have the resources and intent to carry out long haul travel to Australia. They have the mindset of a 'Traveller', as opposed to a 'Tourist', and want authentic, unique, and engaging experiences. Travel is not about "seeing", it's about "doing".

AIR ACCESS

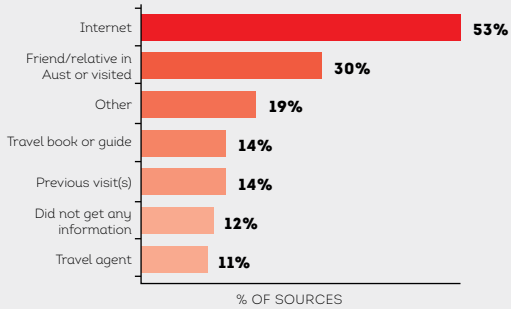
- ▶ Airlines which provide direct access to Adelaide with one stopover include Qantas, Virgin Australia, Air New Zealand, Emirates, Qatar Airways, Delta Airlines, United Airlines, American Airlines, Air Canada, Fiji Airways and China Southern Airlines.

MARKET INSIGHTS

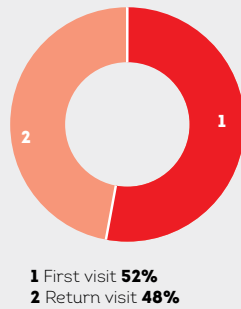
- ▶ Compared to some other parts of the country, South Australia is lesser known and more difficult to reach. But for our "Travellers", this is appealing. They will (literally!) go the extra mile, spending the extra time and effort to go where most tourists won't in order to have a unique and authentic Australian experience.
- ▶ Trade partners are extremely important for delivering arrivals to South Australia. Australia remains challenging to sell so working with key Australian specialists in the market helps break down barriers around time, distance and knowledge, particularly considering the limited time that Americans and Canadians can take for annual leave.
- ▶ In-market visitation with travel trade is critical to success in North America, where personal relationships play an important role.
- ▶ North American visitors expect high quality food and wine.
- ▶ Generally North American consumers have high expectations of service and are prepared to pay premium prices. However, they need value associated with it.
- ▶ Distinct, customised experiences are appealing, as opposed to off-the-rack standardised tours that feel scripted or routine.
- ▶ Online distribution partners are becoming increasingly important as consumers begin to explore other ways to book their travel.
- ▶ The SATC focuses on targeting quality media partners through strong public relations activities which help drive demand with the high-value consumer.

INTERNATIONAL MARKET PROFILE NORTH AMERICA

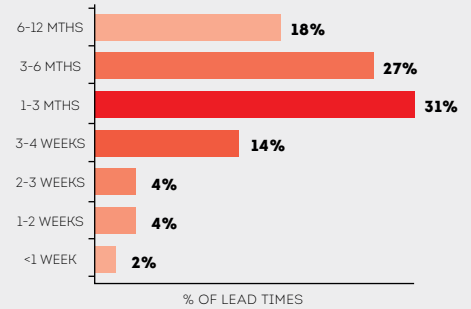
INFORMATION SOURCES



FIRST OR RETURN VISIT



BOOKING LEAD TIMES



KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
STELLA TRAVEL SERVICES TRAVEL 2 QANTAS VACATIONS	QANTAS HOLIDAYS
HELLOWORLD	
SWAIN DESTINATIONS	SWAIN DESTINATIONS
DOWN UNDER ANSWERS	AOT
GOWAY TRAVEL	GOWAY TRAVEL
ABERCROMBIE & KENT	ABERCROMBIE & KENT
DOWN UNDER TRAVEL	HELLOWORLD QANTAS VACATIONS
ABOUT AUSTRALIA	DIRECT - NO ITO
ANDERSON VACATIONS	AOT PAN PACIFIC HOUSE OF TRAVEL
ASPIRE DOWNUNDER	ATS PACIFIC
BOOMERANG TOURS	ATS PACIFIC
DOWNUNDER ENDEAVOURS	ONE PACIFIC
GLOBUS MONOGRAMS	CIRCUIT TRAVEL
SPRINGBOARD VACATIONS	PAN PACIFIC TRAVEL
SOUTHERN WORLD	SOUTHERN WORLD
TRAFALGAR TOURS	AAT KINGS

CONTRACTING & BROCHURE TIMES

The entire process can take at least one year, but more likely up to 2 years.

TOP TRAVEL WEBSITES

BOOKING.COM	TRIP ADVISOR
YAHOO TRAVEL	EXPEDIA
PRICELINE	HOTELS.COM
TRAVELOCITY	KAYAK.COM
ORBIZ	HOTWIRE

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.