

# 2024 INTERNATIONAL MARKET UPDATE

# USA

## MARKET OVERVIEW

Results based on year ending June 2024

- The USA is South Australia's third largest inbound market and is currently 10% down on pre-Covid visitation levels, and 34% up on expenditure levels.
- The American market is beginning to venture outside of Adelaide and Kangaroo Island with the Flinders Ranges and Outback, Eyre Peninsula and self-drive journeys being promoted and brochured via major wholesalers.
- Key demand-driving experiences include wildlife, outback and wine (referred to as 'WOW' experiences).
- American visitors are categorised as high yield experience seekers, often time poor, with high median household income. They are well travelled and have a propensity to travel long haul.
- 42% of visits are for the purpose of Holiday, 43% for Visiting Friends and Relatives (VFR).
- 44% of American visitors to South Australia have been to Australia before.

## SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

### VISITORS



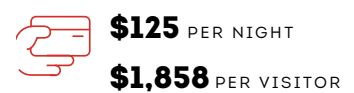
### NIGHTS



### EXPENDITURE



### AVERAGE SPEND



### AVERAGE LENGTH OF STAY

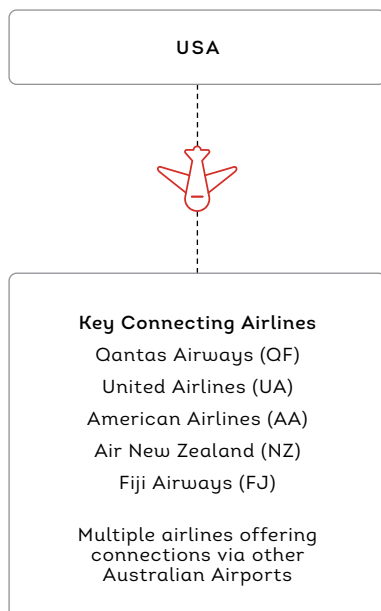


### INTERNATIONAL RANKING IN SOUTH AUSTRALIA

**#3** FOR VISITORS  
**#6** FOR NIGHTS  
**#6** FOR EXPENDITURE

<sup>#</sup>A high average due to VFR.

## AIR ACCESS



## FAST FACTS & FIGURES

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

USA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
<b>Visits (SA)</b>	<b>29</b>	<b>17</b>	<b>9</b>	<b>3</b>	<b>54</b>
<b>Visits (AUS)</b>	<b>418</b>	<b>247</b>	<b>141</b>	<b>142</b>	<b>748</b>
<b>Nights (SA)</b>	<b>189</b>	<b>250</b>	<b>125</b>	<b>111</b>	<b>676</b>
<b>Nights (AUS)</b>	<b>5,189</b>	<b>3,837</b>	<b>1,445</b>	<b>3,020</b>	<b>13,419</b>
<b>ALOS - Nights (SA)</b>	<b>7</b>	<b>15</b>	<b>14</b>	<b>37</b>	<b>13</b>
<b>ALOS - Nights (AUS)</b>	<b>12</b>	<b>16</b>	<b>10</b>	<b>21</b>	<b>18</b>

**Expenditure** **\$72M**

ALOS = Average Length Of Stay, VFR = Visiting Friends and Relatives.

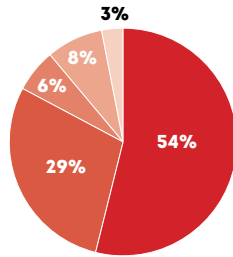
## VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



### Travel party description (to SA)

- Unaccompanied
- Adult couple
- Family group
- Friends/relatives travelling together
- Business



## IMPORTANCE FACTORS

Data from Consumer Demand Project (CDP) report - August 2023



**49%**  
Safety and security  
VS. 53% GLOBAL AGGREGATE



**39%**  
Good food and wine  
VS. 37% GLOBAL AGGREGATE



**35%**  
Friendly citizens  
VS. 31% GLOBAL AGGREGATE



**33%**  
World class beauty and nature  
VS. 40% GLOBAL AGGREGATE



**31%**  
Value for money  
VS. 37% GLOBAL AGGREGATE

GLOBAL AGGREGATE: This is from the Consumer Demand Project research conducted quarterly by Tourism Australia in 12 key international markets for Australia. Global aggregate refers to the average across all these markets.

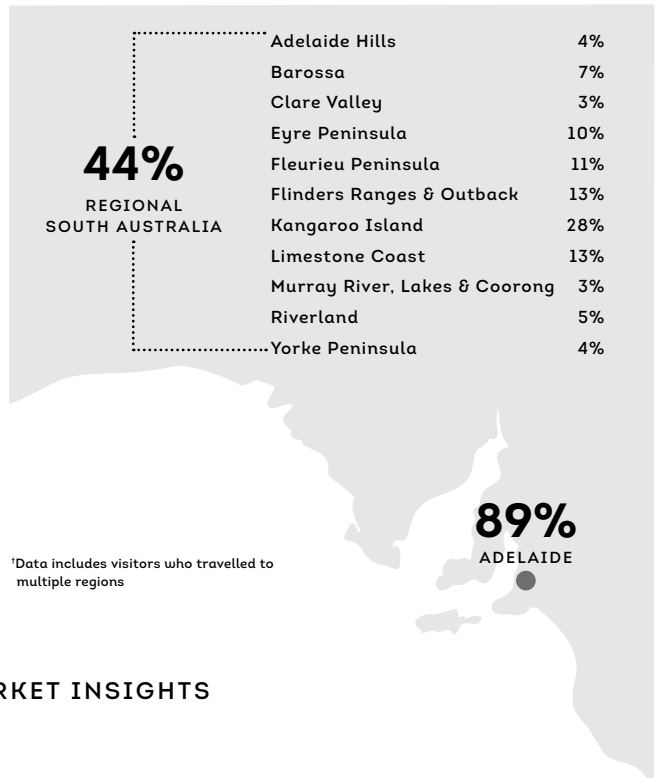
## TARGET MARKET PROFILE



**Affluent experience seeker:** 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'.

## VISITOR DISPERSAL†

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



## MARKET INSIGHTS

- American travellers are interested in food and wine, culture, soft-adventure, wildlife and nature.
- When compared to some other states in Australia, South Australia is lesser known and more difficult to reach. For American "Travellers", this is appealing and they are prepared to go the extra mile where most tourists won't, to have a unique and authentic Australian experience.
- With high expectations of service, American consumers are prepared to pay premium prices. However, they need value associated with it and distinct, customised experiences that are appealing, as opposed to off-the-rack standardised tours.
- Trade partners are extremely important for delivering arrivals to South Australia. Working with key Australian specialists in the market helps break down barriers around time, distance and knowledge, considering the limited time that Americans can take for annual leave. The SATC continues to grow and strengthen relationships with key partners and engage in cooperative campaigns to reach their engaged audiences.
- Personal relationships play an important role in America, and therefore in-market visitation with travel trade is important.
- The SATC public relations activity focuses on targeting quality media partners to drive demand with the high-value consumer.
- Online distribution partners are becoming increasingly important as consumers explore other ways to book their travel.
- Sustainability continues to increase in importance. People are choosing to travel to places where the environment, the local community, and the culture are respected. Also emerging is more interest in accessibility for the inclusivity of all travellers.

## BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024



## TOP 3 BARRIERS TO VISITING AUSTRALIA

Data from Consumer Demand Project (CDP) report - August 2023



**Expensive airfares**



**It is too far to travel**



**Other places I would prefer to go**

## CONTRACTING & BROCHURE TIMES

Few American trade partners print brochures any more. Therefore, contracting of rates can take place throughout the year.

## USA CHECKLIST

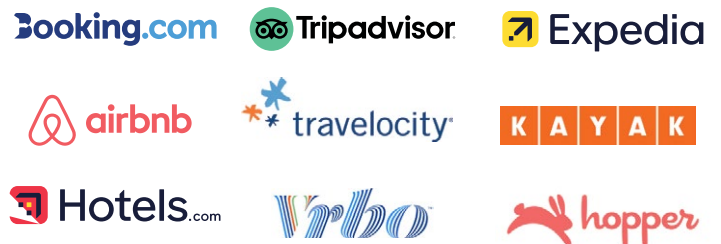
Consider the following points when targeting American travellers:

- ✓ Focus on the **uniquely Australian** aspect of your experience
- ✓ **Sell the feelings**, senses, and memories, not the features
- ✓ **Stay in touch with buyers**. Frequency will help you stay top of mind.
- ✓ **Partnering** with others makes it easy for buyers and travellers to spend time in SA.

## KEY TRADE PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
Travel2	
Helloworld	AOT
Down Under Answers	
Swain Destinations	Swain Destinations
Goway Travel	Goway Travel
Abercrombie & Kent	Abercrombie & Kent
Aspire Downunder	ATS Pacific Southern World
Downunder Endeavours	One Pacific
Globus Monograms	Circuit Travel
Springboard Vacations	Pan Pacific Travel Southern World
Southern World	Southern World
Trafalgar Tours	AAT Kings
ANZCRO	ANZCRO
Avanti	Pan Pacific

## TOP TRAVEL WEBSITES & APPS



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**Disclaimer: Source:** International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia. Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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