

# NORTH AMERICA

INTERNATIONAL MARKET UPDATE 2025

## MARKET OVERVIEW

- The North American market incorporates both the USA and Canada.
- The USA is South Australia's third largest market for visitation and Canada is the ninth largest as of June 2025.
- 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.
- Key demand-driving experiences include Wildlife, Outback and Wine (referred to as 'WOW' experiences). There is also a growing interest in Aboriginal culture, sustainability focused tourism, and soft adventures such as hiking and water-based activities.
- North American visitors remain high-value, long-haul travellers with a median household income above the global average, a propensity for multi-destination itineraries, and a willingness to pay premium prices for distinct experiences.
- 46% of North American visitors to South Australia have been to Australia before.\*
- 42% of visits are for the purpose of Holiday, 39% for Visiting Friends and Relatives (VFR).\*



## FAST FACTS & FIGURES

Data is USA and Canada combined and an annual average over 2 years ending June 2024-June 2025

NORTH AMERICA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	26,000	23,000	7,000	4,000	53,000
VISITS (AUS)	469,000	320,000	109,000	178,000	825,000
NIGHTS (SA)	194,000	432,000	61,000	117,000	805,000
NIGHTS (AUS)	6,053,000	5,884,000	1,141,000	3,107,000	16,185,000
ALOS - NIGHTS (SA)	8	19	9	30	15
ALOS - NIGHTS (AUS)	13	18	10	17	20
EXPENDITURE (SA)	\$111m				

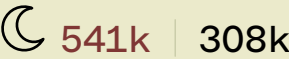
ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.  
\*AN ANNUAL AVERAGE OF USA AND CANADA DATA OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.

## SNAPSHOT OF CURRENT STATISTICS – JUNE 2025

VISITORS ● USA ● Canada



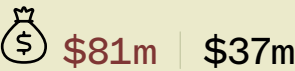
NIGHTS



AVERAGE LENGTH OF STAY



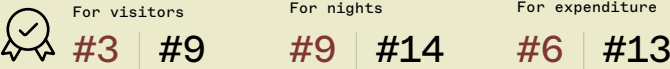
EXPENDITURE



AVERAGE SPEND



INTERNATIONAL RANKING IN SOUTH AUSTRALIA



## AIR ACCESS

DIRECT AIRLINE

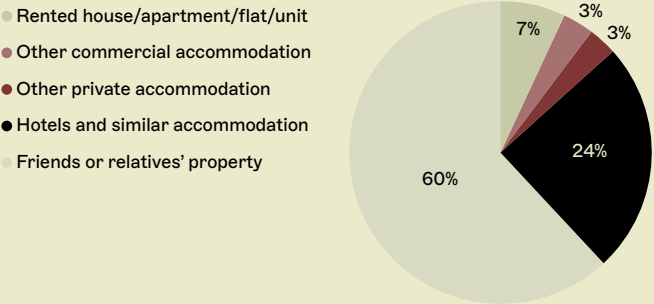
- United Airlines (UA) flies direct from San Francisco to Adelaide. The route operates seasonally from December through to March and is scheduled to return in December 2026 and December 2027.

KEY CONNECTING AIRLINES

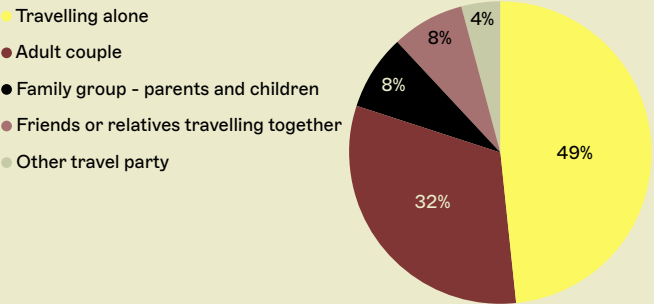
- Qantas Airways (QF)
- American Airlines (AA)
- Air New Zealand (NZ)
- Fiji Airways (FJ)
- Air Canada (AC)
- Multiple airlines offering connections via other Australian airports

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS\*

Visitor accommodation type (in South Australia)



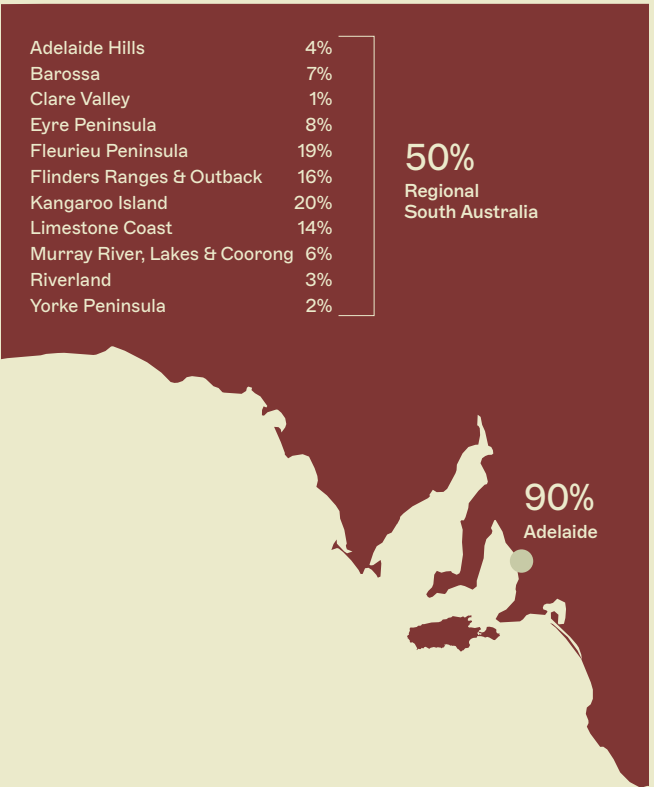
Travel party description (to South Australia)



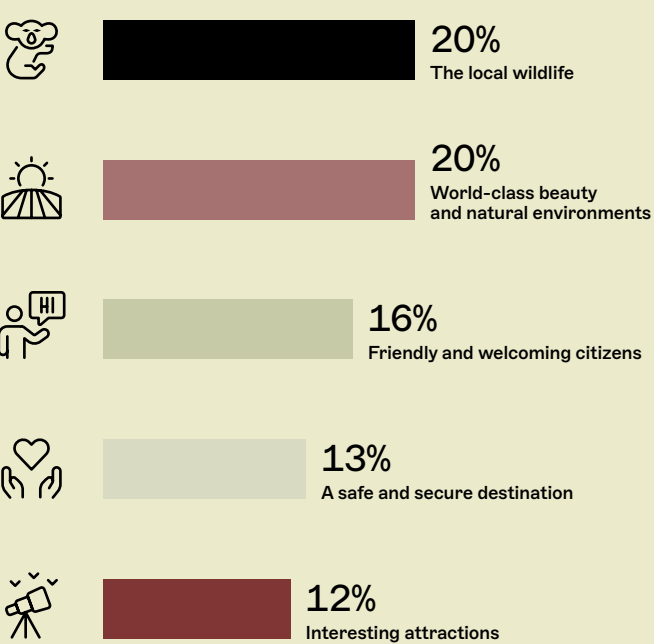
MARKET INSIGHTS

- North American travellers are interested in food and wine, culture, soft-adventure, wildlife and nature.
- Whilst there are many similarities between the USA and Canadian markets, there are also some key differences. Americans will generally have a shorter length of stay in Australia, but more likely to spend more per night. Canadians will have the time to disperse further into regions and more likely to consider self-drive as an option.
- When compared to some other states in Australia, South Australia is less known and more difficult to reach. For the South Australian Tourism Commission's (SATC) North American target audience, this is appealing, and they are prepared to go the extra mile where most travellers won't, to have a unique and authentic Australian experience.
- With high expectations of service, North 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 key for driving North American visitation to South Australia, helping overcome barriers like distance, time, and limited destination knowledge. The SATC continues to strengthen these relationships through cooperative campaigns and in-market engagement, recognising the importance of personal connections in this market.
- SATC public relations activity focuses on targeting quality media partners to drive awareness and demand with the high-value consumer.
- The complexity of travel is increasing the demand for human guidance. 66% of Americans and 47% of Canadians say they will use a travel agent within the next two years – up from 49% for Americans and 41% for Canadians last year. This trend is driven primarily by Millennials. It is also heavily skewed to affluent travellers, with 84% of Americans agreeing that a travel advisor is more valuable than unlimited internet research.
- Premium travel is on the rise: 34% of Americans now routinely fly business or first class, up from 25% in 2024. Despite investing in luxury experiences, 8 in 10 will accept connecting flights for better prices.
- While online travel agents (OTAs) remain popular, the US OTA market may be hitting a plateau as supplier-direct bookings and other factors weigh in. Artificial Intelligence (AI) is one of these factors, with a third of American travellers using AI extensively to research, plan and book. (North American travel advisors are leading in the adoption of AI tools).
- 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.
- There is a growing trend towards shoulder-season and cooler-weather travel (“cool-cations”), as Americans look to avoid extreme heat and crowded peak seasons.
- There is also a growing trend for solo travel which is expected to grow annually by 9.1% until 2030, with women solo travellers driving this growth (71% of solo travellers are women).

VISITOR DISPERSAL\*\*



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA\*



\*AN ANNUAL AVERAGE OF USA AND CANADA DATA OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.  
+DATA INCLUDES USA AND CANADIAN VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

## TARGET MARKET PROFILE

Generally older couples remain the core audience, but there is also steady growth among younger high-income professionals and small groups of friends.



**PRIMARY**  
Affluent Experience Seeker

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'.



**SECONDARY**  
Emerging Young Traveller

Typically late 20s to early 40s, often dual-income professionals or remote workers with a high disposable income. They are motivated by adventure, cultural authenticity, and shareable experiences, and are more likely to discover and book travel digitally. This group tends to favour flexible, independent itineraries over traditional group tours, often combining iconic highlights with off-the-beaten-path exploration. They are drawn to South Australia's wildlife, food and wine, and nature, but also seek Aboriginal-led experiences, sustainability focused operators, and opportunities for outdoor activity. For them, travel is about 'living like a local' and creating memorable stories, not just sightseeing.

## BOOKING PREFERENCES

● USA ● Canada



**31% | 37%**  
Online Travel Agent  
(e.g. Expedia)



**57% | 48%**  
Direct with Airline



**22% | 26%**  
Retail Travel Agent/  
Tour Operator



**38% | 25%**  
Direct with  
Accommodation

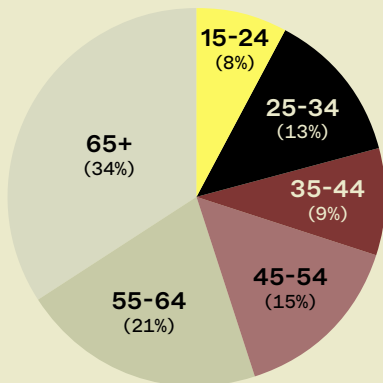


**17% | 11%**  
Direct with  
Experience Provider



**3% | 6%**  
Other

## NORTH AMERICAN VISITORS TO SOUTH AUSTRALIA BY AGE GROUP\*



## NORTH AMERICA CHECKLIST

Consider the following points when targeting North American travellers:

- ✓ Focus on the uniquely Australian aspect of your experience.
- ✓ Sell the feelings, senses, and memories, not the features.
- ✓ Stay in touch with trade partners. Frequency will help you stay top of mind.
- ✓ Partnering with other South Australian operators makes it easier for travel trade partners and travellers to spend time in South Australia.

## CONTACT

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### NORTH AMERICA

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Government of South Australia  
South Australian Tourism Commission

## KEY TRADE PARTNERS

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

## TOP TRAVEL WEBSITES AND APPS



\*AN ANNUAL AVERAGE OF USA AND CANADA DATA OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.  
DISCLAIMER: SOURCE: INTERNATIONAL VISITOR SURVEY JUNE 2024 AND JUNE 2025 CONDUCTED BY TOURISM RESEARCH AUSTRALIA, CONSUMER DEMAND PROJECT (CDP) 2024. TOURISM AUSTRALIA USA MARKET SNAPSHOT 2025, PREFERRED HOTEL/HARRIS POLL, MMGY PORTRAIT OF AMERICAN AND CANADIAN INTERNATIONAL TRAVELER 2025, PHOCUSWRIGHT, SKIFT & RATEHAWK. TOTALS MAY NOT ADD TO 100% DUE TO ROUNDING. 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 DECEMBER 2025.