

# UNITED KINGDOM

INTERNATIONAL MARKET UPDATE 2026

## MARKET OVERVIEW

- The United Kingdom (UK) is South Australia's largest inbound market and is ranked 2nd for expenditure as of March 2026.
- Visitors from the UK are affluent travellers seeking authentic and immersive Australian experiences.
- Most UK travellers within our Primary target audience choose to book their trips to Australia through travel agents primarily due to the long distance, safety considerations, and the complexity of coordinating multiple travel components. However, before engaging with an agent, they typically conduct their own research and planning online.
- Key demand driving experiences include nature and wildlife, coastal and aquatic, food and wine. Road trips and train journeys have strong appeal to the UK visitor.
- Emerging trends include travel planning shifting to 'Always On' discovery through social media. 'Escaping the everyday' is a non-negotiable when it comes to a holiday and sustainable practises are expected by consumers.
- 55% of visits are for the purpose of Holiday, 44% for Visiting Friends & Relatives (VFR).\*
- 62% of UK visitors to South Australia have been to Australia before.\*



## FAST FACTS & FIGURES

Data is an annual average over 2 years ending March 2025-March 2026

| UNITED KINGDOM      | HOLIDAY    | VFR       | BUSINESS | OTHER     | TOTAL      |
|---------------------|------------|-----------|----------|-----------|------------|
| VISITS (SA)         | 35,000     | 28,000    | 5,000    | 4,000     | 64,000     |
| VISITS (AUS)        | 364,000    | 409,000   | 45,000   | 110,000   | 672,000    |
| NIGHTS (SA)         | 511,000    | 594,000   | 38,000   | 288,000   | 1,431,000  |
| NIGHTS (AUS)        | 11,413,000 | 8,978,000 | 640,000  | 4,177,000 | 25,208,000 |
| ALOS - NIGHTS (SA)  | 14         | 21        | 7        | 76        | 22         |
| ALOS - NIGHTS (AUS) | 31         | 22        | 14       | 38        | 38         |
| EXPENDITURE (SA)    |            |           |          |           | \$141m     |

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.  
\*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.  
#A HIGH AVERAGE DUE TO VFR.

## SNAPSHOT OF CURRENT STATISTICS – MARCH 2026

### VISITORS

 71k

### NIGHTS

 1.45m

### AVERAGE LENGTH OF STAY

 20 nights<sup>#</sup>

### EXPENDITURE

 \$161m

### AVERAGE SPEND

 \$111 per night      \$2,262 per visitor

### INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #1 for visitors  
#3 for nights  
#2 for expenditure

## AIR ACCESS

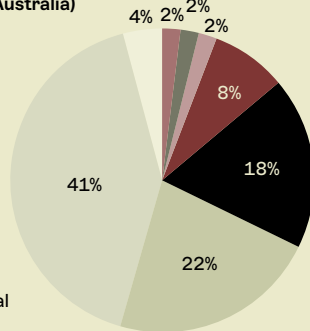
### KEY CONNECTING AIRLINES

- Qatar Airways (QR)
- Emirates (EK)
- Singapore Airlines (SQ)
- Malaysia Airlines (MH)
- Cathay Pacific (CX)
- Qantas Airways (QF)
- China Southern Airlines (CZ)
- China Eastern Airlines (MU)
- Multiple airlines offering connections via other Australian airports

## VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS\*

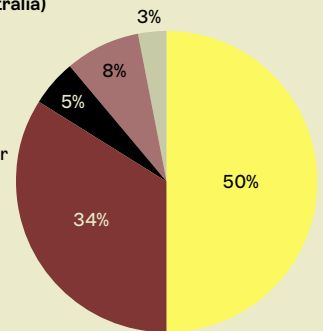
### Visitor accommodation type (in South Australia)

- Other commercial accommodation
- Backpacker or hostel
- Other accommodation
- Other private accommodation
- Hotels and similar accommodation
- Rented house/apartment/flat/unit
- Friends or relatives' property
- Caravan or camping - Non Commercial



### Travel party description (to South Australia)

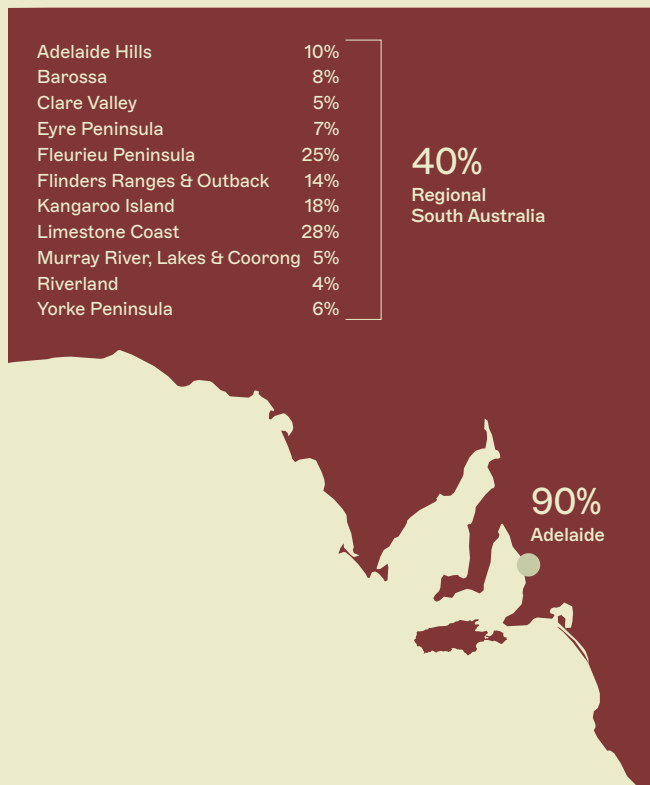
- Travelling alone
- Adult couple
- Family group - parents and children
- Friends or relatives travelling together
- Other travel party



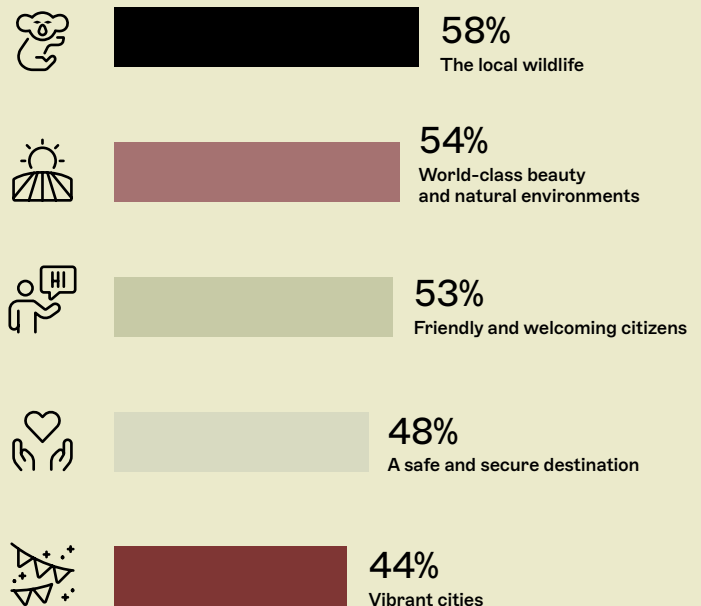
## MARKET INSIGHTS

- The South Australian Tourism Commission (SATC) continues to foster strong relationships with key distribution partners, inbound tour operators (ITOs) and Tourism Australia. These partners are critical to ensuring awareness of South Australia's key messaging, bringing new product to market and supporting product development, communications and itinerary building.
- The SATC continues to develop strong relationships with airlines to drive strong passenger numbers to South Australia.
- Storytelling plays a vital role in showcasing the authenticity and diversity of South Australia and its tourism experiences. The SATC delivers integrated cooperative campaigns in partnership with key partners that possess strong digital marketing capabilities, are committed to consumer-facing initiatives, and can effectively drive conversion.
- Luxury travel is now outpacing the broader travel market in the UK. Affluent travellers are seeking more than indulgence, they want authenticity, connection, and the feeling of being somewhere rare, where few have gone before.
- UK travellers prioritise quality and value, with many willing to pay more for a better experience. Rather than compromising on the standard of their holiday, they prefer to travel less frequently to ensure their trips meet expectations.
- UK travellers are increasingly drawn to expansive natural landscapes, personalised experiences, and a slower, more meaningful style of travel. There's a clear shift from indulgence to exclusivity, and from the artificial to the authentic. As preferences move away from status-driven destinations toward more intimate, lesser-known journeys, South Australia's offering is uniquely positioned to meet this evolving demand.
- UK is the largest market for working holiday makers, and an important segment for length of stay and regional dispersal.
- Key trade partners have reported that family travel has seen a high increase in growth out of all customer segments. Parents are increasingly choosing long-haul holidays over short-haul due to narrowing price gap with the rise in costs of European holidays.
- Rail travel continues to grow in popularity which has led to a number of trade partners, including Trailfinders and Original Travel to launch a dedicated rail brochure.

## VISITOR DISPERSAL\*\*



## FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA\*



\*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.  
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

## TARGET MARKET PROFILE



### PRIMARY

High value travellers who have the time and propensity to travel long-haul, spend two to three times more than the average traveller and disperse widely throughout Australia. When choosing a holiday destination food and wine and nature based experiences are important.



### SECONDARY<sup>§</sup>

Youth and Working Holiday Visa (WHV)<sup>§</sup> holders who have a longer length of stay in Australia, wide regional dispersal and higher spend.

## BOOKING PREFERENCES



33%

Online Travel Agent  
(eg. Expedia)



47%

Direct with Airline  
(eg. Qantas)



33%

Retail Travel Agent/  
Tour Operator



24%

Direct with  
Accommodation



13%

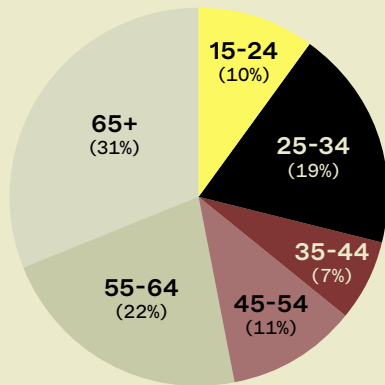
Direct with  
Experience Provider



2%

Other

## UK VISITORS TO SOUTH AUSTRALIA BY AGE GROUP\*



## UNITED KINGDOM CHECKLIST

Consider the following points when targeting travellers from the UK:

- ✓ Highlight accessibility from Adelaide for example, Kangaroo Island is a short 30 minute flight from Adelaide, or Flinders Ranges and Outback is an easy 5 hour drive from Adelaide via the wineries in the Clare Valley.
- ✓ UK visitors rarely visit one state and they're likely to be combining South Australia with at least one or two more states. They are limited on time so make it clear why they must include your product in their itinerary. Be uniquely South Australian.
- ✓ Showcase wildlife in the wild experiences (land and sea) and the great South Australian outdoors.
- ✓ Highlight if owner operated or using local guides – it's a key unique selling point in South Australia and provides guests with an authentic experience.
- ✓ Consider including multiple types of experiences within the product. For example, combine wine with a cultural experience.
- ✓ Highlight sustainability practices and credentials as UK travellers consider sustainability as an expected not an extra.



<sup>§</sup>THE FREE TRADE AGREEMENT HAS INCREASED THE AGE TO 35.

\*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.

KEY TRADE PARTNERS

| KEY WHOLESALE PARTNERS    | INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA |
|---------------------------|---------------------------------------------|
| Barrhead Travel           | ATS Pacific                                 |
| Audley Travel             |                                             |
| Gold Medal                |                                             |
| Lotus/Dial A Flight       |                                             |
| Trailfinders              |                                             |
| Travelbag                 |                                             |
| Destinology               | Pan Pacific                                 |
| Discover the World        |                                             |
| Freedom Destinations      |                                             |
| If Only...                |                                             |
| Lotus/Dial A Flight       |                                             |
| Original Travel           |                                             |
| Premier Holidays          |                                             |
| Steppes Travel            |                                             |
| Trailfinders              |                                             |
| Wexas                     |                                             |
| Turquoise Holidays Travel | Southern World                              |
| Travel Counsellors        |                                             |
| Travel Nation             |                                             |
| First Class Holidays      |                                             |
| Hays Travel               |                                             |
| Prestige Travel           |                                             |
| Elegant Resorts           | Southern Crossings                          |
| Scott Dunn                |                                             |
| Inspiring Travel (ITC)    |                                             |
| Swords Travel             |                                             |
| Kuoni                     | AOT                                         |
| Titan Travel              |                                             |
| Audley Travel             | Goway                                       |
| Cox & Kings               | Direct through A&K                          |
| Flight Centre             | Direct/Inhouse                              |
| Trailfinders              | Direct                                      |
| Abercrombie & Kent        | Direct/Inhouse                              |
| Carrier                   | ANZCRO                                      |
| ANZCRO                    |                                             |
| Swords Travel             | The Tailor                                  |

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Government of South Australia  
South Australian Tourism Commission

TOP TRAVEL RESOURCES



TOP ONLINE TRAVEL AGENTS



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