

# GLOBAL MARKETING INDUSTRY FOURM

## 23<sup>rd</sup> SEPTEMBER 2022



**ADELAIDE**  
SOUTH AUSTRALIA



An aerial photograph of a coastal landscape. The foreground and middle ground are dominated by eroded, reddish-brown hills with deep, vertical gullies. A narrow, light-colored beach curves along the base of these hills, meeting a calm, deep blue bay. The background shows rolling hills under a soft, golden light, suggesting either sunrise or sunset. The sky is a pale, hazy blue.

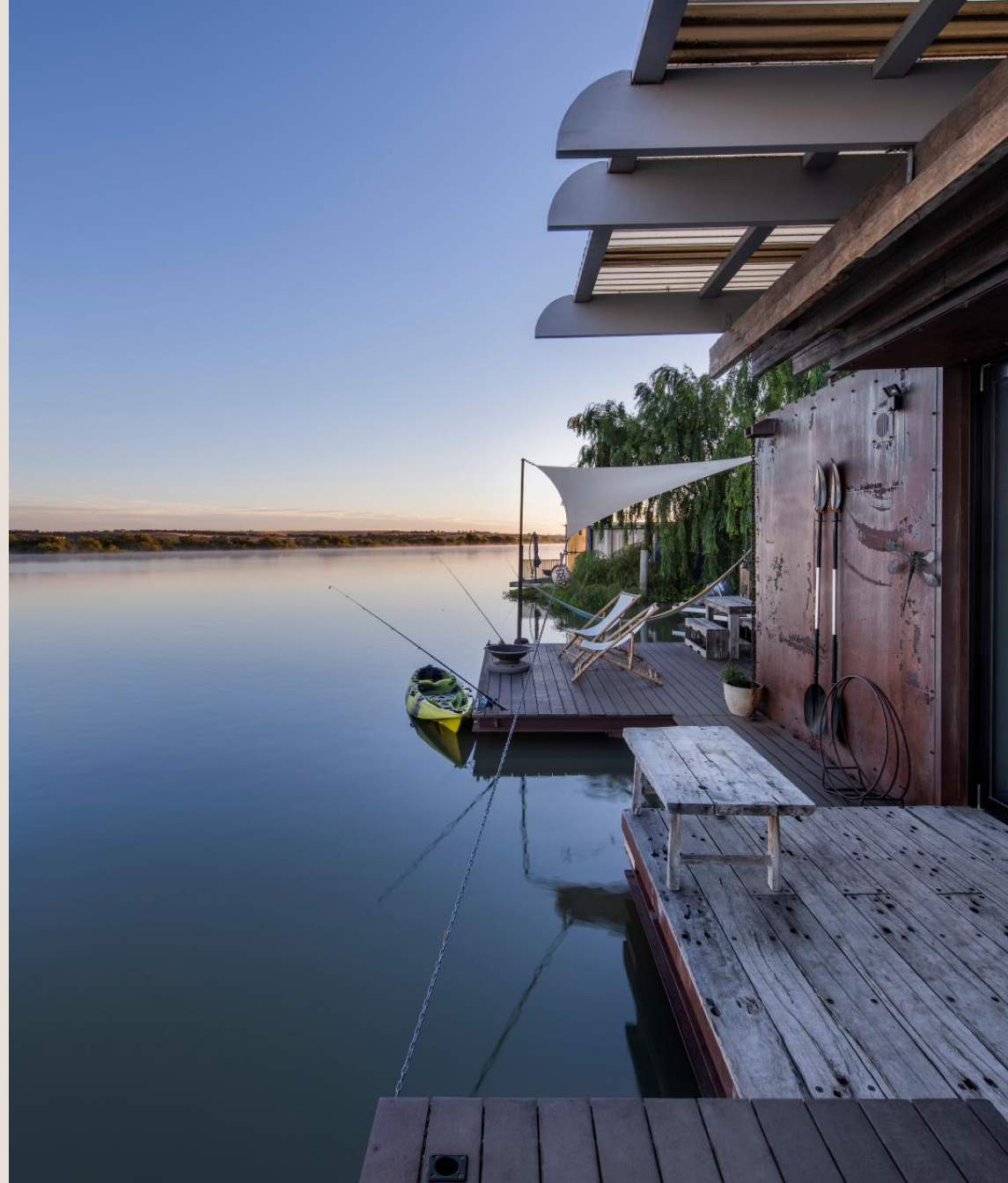
# New Zealand

Presented by Stacey Kerr and Sarah Coney



# HELLO FROM NZ

- The Current Landscape
- The 'New' New Zealand Traveller...
- Trade Landscape & Industry Insights
- PR Insights
- Where to next? 2022.23 & Beyond
- Opportunities





# CURRENT LANDSCAPE

- Unprecedented levels of outbound travel enquiry since borders reopened
  - Kiwis are ‘dreaming’ and ‘planning’ their Australian holidays
  - Travel for holiday purposes has overtaken VFR
- Yet several factors are stifling conversion:
  - The **cost to travel remains high**
  - Air capacity is limited and flights are regularly cancelled
  - **Uncertainty** towards travel from our older audience in particular
- NZ is in the midst of a ‘**cost of living crisis**’ however past experience has shown that **Australia typically holds its own.**
- 2022 set to be the year of ‘**rebuilding**’, while 2023 expected to bring increased stability, greater airline competition and a return to booking confidence.





# TARGET AUDIENCE | HIGH VALUE TRAVELLERS

**Primary Audience**  
45 – 64years

**Secondary Audience**  
35 – 45years

**Stay longer**  
**Spend more**  
**Disperse into region**

**SIZE OF THE HVT MARKET**  
**IN NZ**

**1.29M**

900K considering Australia



# THE 'NEW' NZ TRAVELLER

- Traveller sentiment has changed dramatically as a result of the pandemic
  - A rise in 'Revenge Travel'
  - Increased demand for luxury/high end products
  - A shift towards 'new and different' destinations + experiences
- 25% of Kiwis will book South Australia through a traditional travel agent, 75% are still comfortable to book direct.
- Demand for sole-state holidays has further strengthened (as opposed to multi-State)
- Kiwis want to stay longer in South Australia – up to 2 weeks
- Australia is considered a **safe destination to travel to**, and South Australia considered one of the safest States





# KEY DRIVERS FOR THE NZ MARKET

**Food &  
Wine/Beverage**

**Accessibility**



**'New' and  
'Different'**



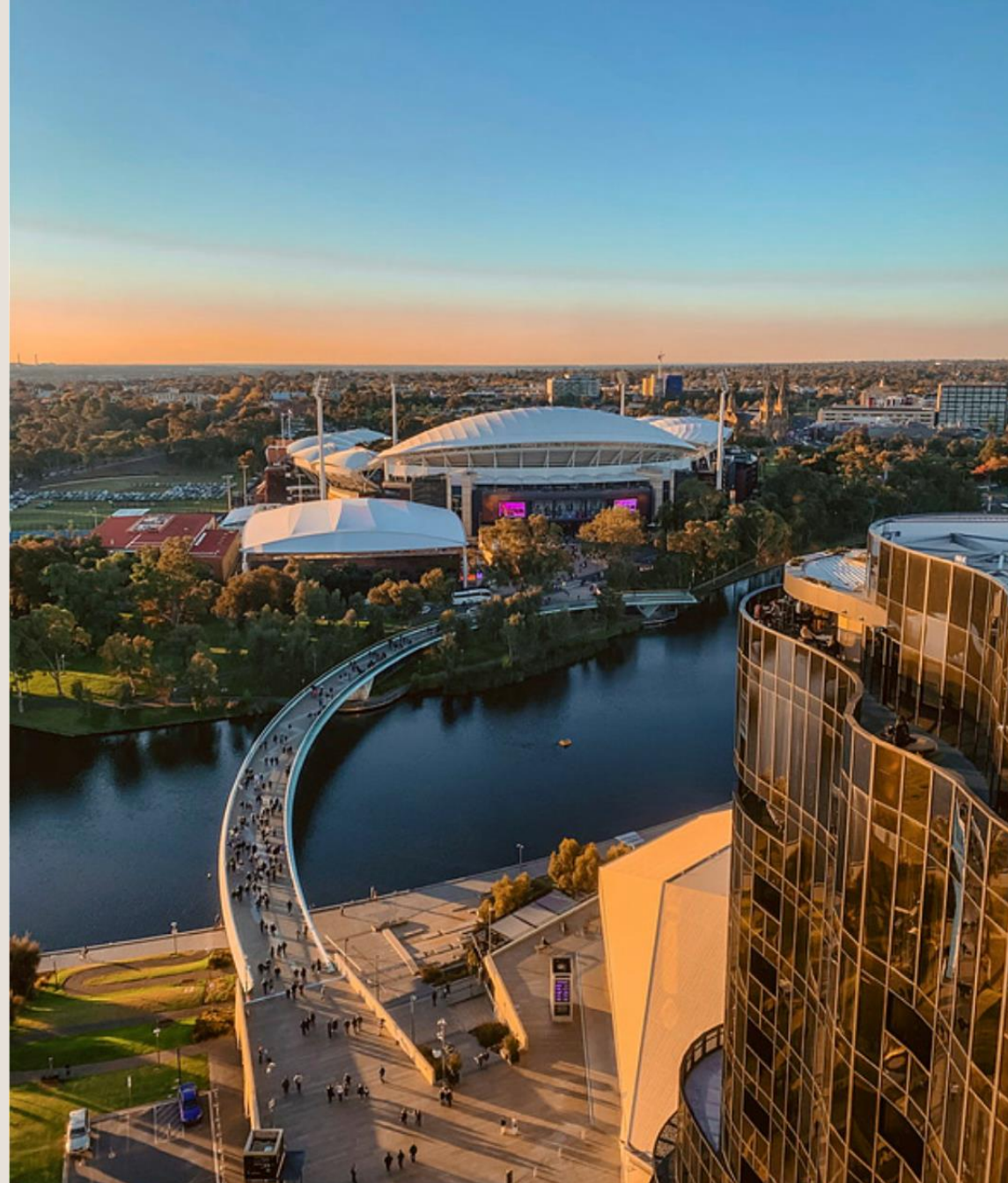
**Road Trips**





# TRADE LANDSCAPE

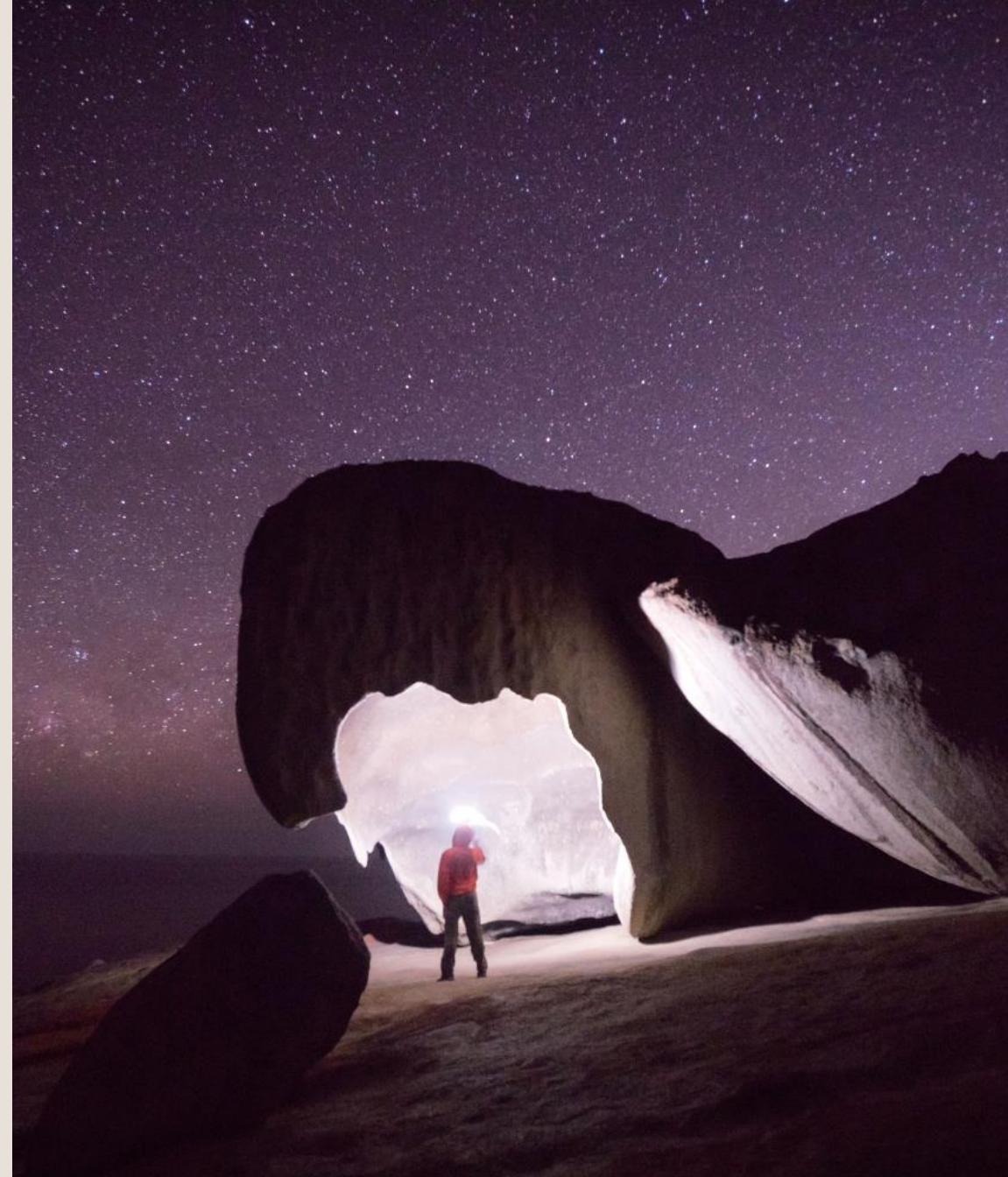
- Travel Trade were hit hard by the pandemic, significant job losses but have **retained much of our 'Australian' knowledge** amongst the main wholesalers
- A more **diverse trade landscape has emerged**
  - Key Distribution Partners – House of Travel (67 stores), Helloworld (32 stores) and Flight Centre (36 stores)
  - An increase in Brokers, Independents and Specialists (particularly luxury)
- 39% of Kiwis say they are 'more likely' to **book through a travel agent**, therefore working with the Trade remains a key priority in the market





## EMERGING TRENDS

- Revenge Travel
- Bucket-list travel destinations
- 'Experiences' versus 'stuff' – travellers looking for more memorable experiences
- Travelling with friends
- Sustainability in travel
- Sole-State Travel
- Longer booking to travel lead times due to high airfares
- Confidence and clarity for travellers will be key





## HOW WE'RE APPROACHING PR IN NZ

- Greater integration between mainstream and digital media
- Longer, more meaningful relationships with social media influencers
- Tapping into a new audience & investing in the up and coming high value traveller
- Utilising talented content creators to enable more than 'just a famil'
- Travel and the post-pandemic experience economy





## HOW WE'RE BRINGING IT TO LIFE

A snapshot:

- Recently engaged Brook Sabin to showcase a winter weekend at Illuminate Adelaide and the Adelaide Hills
- Daisy Dagg and Polly Markus & a tailor made food trip to Adelaide & McLaren Vale. Extension idea in the wings
- Re-charge road trip to the Barossa
- Media event in Auckland shining a light on SA produce

In the pipeline 2022-23

- Family
- The surprise itinerary to KI
- Memories that matter featuring The Flinders Ranges & The Limestone Coast



WHERE TO NEXT?

Farm Shop



ADELAIDE  
SOUTH AUSTRALIA



## 2022-23 & Beyond

- Continue to position South Australia as distinctive and unique in a competitive market by:
  - Building on the momentum of the 'Sometimes I Wonder' brand campaign
  - Giving Kiwis the reasons to choose and book South Australia through evolved messaging
  - Educating the NZ Traveller on what a South Australia holiday 'looks like'
- Drive Bookings
  - Support our consumer-direct activities with aligned Trade and Airline Partnerships that put 'bums on seats'
  - Utilise Events as a hook to drive urgency to book





## 2022-23 & Beyond

- Support the Trade
  - ASP Roadshow supported by TA and STO's, training agents and ASP's around New Zealand (6 – 11 Nov)
  - ASP and Premier Aussie Specialist Trade Famil (18 – 23 November - Adelaide, Adelaide Hills and Fleurieu Peninsula)
  - Helloworld's Travel Brokers 20year Anniversary Conference in Adelaide (2 – 5 Nov, regions TBC)



## 2022-23 & Beyond

- PR
  - Reassure our audience that travel is safe and easy – lean into the direct flight messaging
  - Continue to look for ways to create more impact with



LAKE MACDONNELL  
EYRE PENINSULA

WHAT ON EARTH IS THIS PLACE?



[SOUTH AUSTRALIA.CO.NZ](https://southaustralia.co.nz) | REWARDS WONDER

TALIA GAVES ROCKPOOL  
EYRE PENINSULA

WHAT ON EARTH IS THIS PLACE?



[SOUTH AUSTRALIA.CO.NZ](https://southaustralia.co.nz) | REWARDS WONDER

HEADINGS CLIFF LOOKOUT  
RIVERLAND

WHAT ON EARTH IS THIS PLACE?



[SOUTH AUSTRALIA.CO.NZ](https://southaustralia.co.nz) | REWARDS WONDER





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# HOW CAN YOU GET INVOLVED?

There are a number of ways you can gain greater exposure in the NZ Market:

- Website optimisation & Paid Search – consider expanding reach to New Zealand if active.
- Key Distribution Partners – Touch base with key trade you're contracted with.
- Boyd PR – Send through news, updates, eDM's to [Sarah@boydpr.co.nz](mailto:Sarah@boydpr.co.nz)
- Trade Media Publications – operator news, new products, an increase in Kiwi visitors etc
- The Aussie Specialist Program – Travel Club Offers, Training opportunities, eDM's to agents.
- Trade.southaustralia.com and an active Trade Database
- Famils restarting





# QUESTIONS





# NORTH AMERICA

Presented by Maite Conway-Ross, Ernst Flach & Shannon Crosby







## AGENDA

- North America context
- SATC Americas approach for 2022-2023
- Tips



# THE NORTH AMERICAN MARKET

- COVID-19
- Economic conditions
- The travel mindset & trends

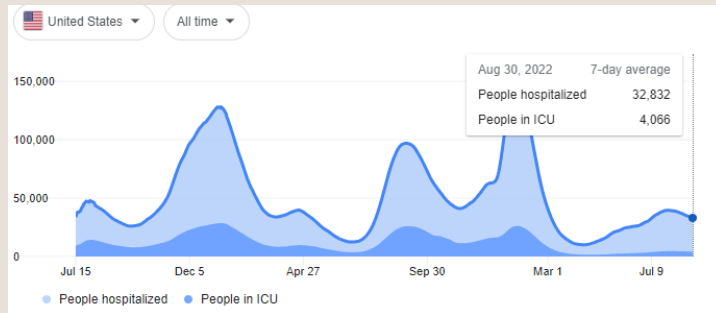




# COVID-19



- 1.04M deaths
- 79% with at least one vaccination
- 68% fully dosed
- 33% with boosters



- 44.2K deaths
- 87% with at least one vaccination
- 83% fully dosed
- 50% with boosters







## ECONOMIC CONDITIONS

### The positive:

- Both the job market and consumer spending remain healthy

### The concerning:

- Inflation and Gas prices rocketing upwards
- Interest rates rising
- Volatile stock markets
- U.S. consumer confidence low

### The outlook:

- Recession fears for 2023



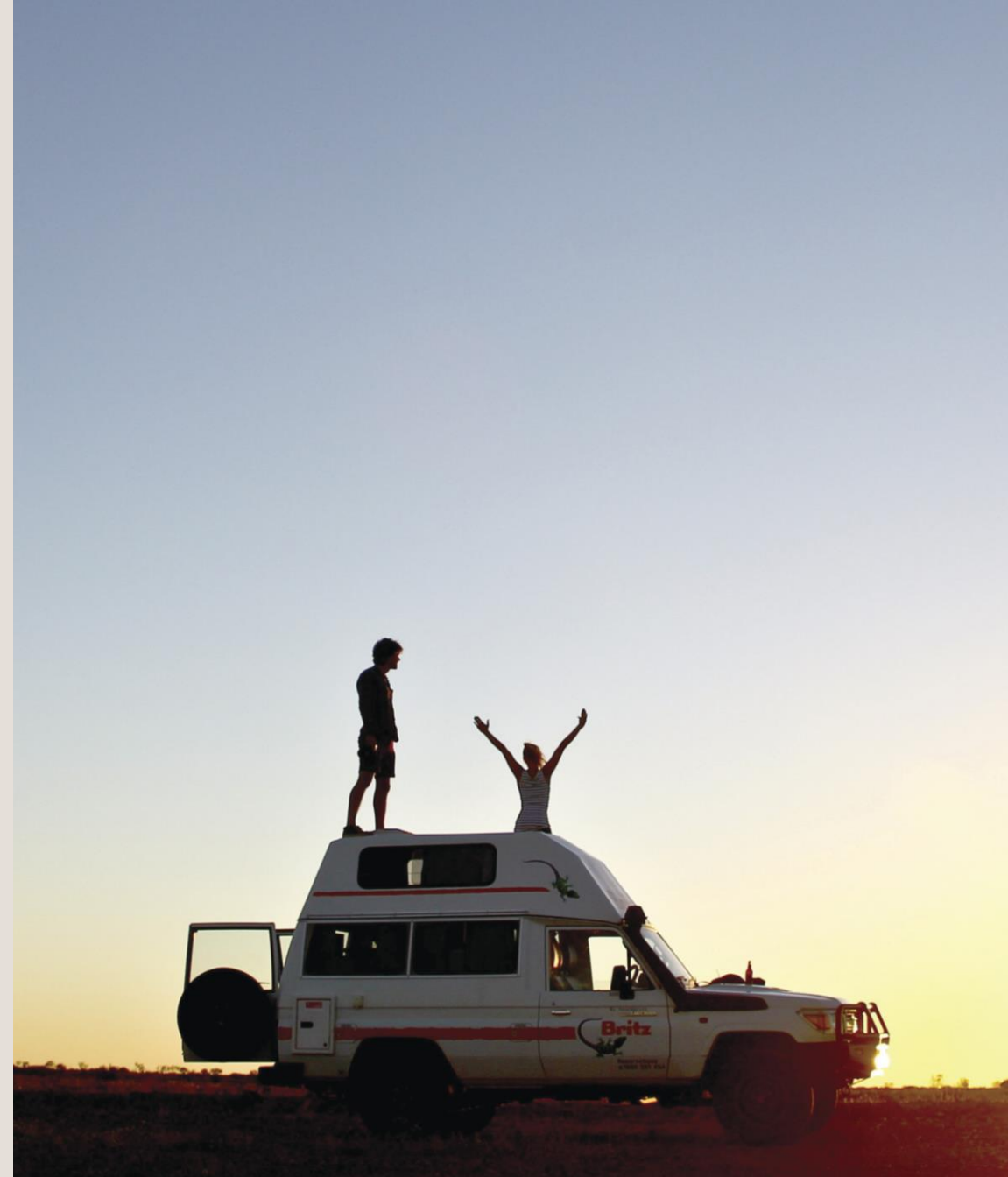
# TRAVEL CONDITIONS

- Attitudes about domestic and international travel are rebounding
- Italy, France, Canada, Mexico, the Caribbean, and Japan are top outbound markets for American travelers
- Australia demand expected to be high in 2023/24
- Airfare expensive due to increased oil costs and lower capacity
- Planning windows for trips are shorter
- Lots of bad press about travel
- Sustainability and support for diversity/inclusion are increasingly important factors



# THE NORTH AMERICAN MARKET

- Huge potential: In 2019, 7.4M high-value American travelers were considering visiting Australia within 4 years\*
- Fragmented distribution: 1.5K wholesalers, 100K advisors, no one dominant seller of Australia\*
- High-yield travelers are looking for authentic experiences that support the increasingly important desire to “travel good”
- US and Canada often overlap from trade and media perspective
- Travel advisors are increasingly important
- Luxury category is strong and resilient





KDPs | TIER 1



KDPs | TIER 2

DOWN UNDER  
ENDEAVOURS

ASPIRE  
DOWN  
UNDER





# NORTH AMERICAN MARKET OVERVIEW | SWOT ANALYSIS

## Weaknesses

- No direct flight access
- Destination isn't as well known as others
- Fewer marketing resources than some other Australian states

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- SA product aligned with affluent traveler's wants
- Strong sustainability story and eco-conscious product
- Punch above our weight in attracting a high-yield traveler
- Brand has a distinct WOW positioning



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- Potential resurgence of pandemic and border closures
- Competition
- Lack of urgency to visit

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## Opportunities

- Affluent travelers least impacted by economy
- Demand for Australia remains high
- Post-pandemic demand for bucket list travel
- Travel trade's increased importance



## SOUTH AUSTRALIA IS THE “ARTISAN AUSTRALIA”:

*For curious-minded travelers (not “tourists”) who want to get closer to their passions, there’s no better reward than Adelaide and the state of South Australia. We deliver this promise based on our up-close-and-personal Australian WOW (**W**ine, **O**utback, and **W**ildlife) experiences, all **easily accessed** from the boutique city of Adelaide.*





## OBJECTIVES LOOKING FORWARD

- Build the South Australia brand through inspiring and educating
- Support conversion





## BRAND BUILDING MEDIA TARGETS

### Travel

*AFAR (Leading affluent travel publication)*

*Conde Nast Traveler (Leading travel lifestyle publication)*

*Travel + Leisure (Leading travel lifestyle publication)*

*Bon Appetit (Leading culinary and travel publication)*

*Bloomberg (Leading business publication that reaches an affluent and sophisticated audience)*

*Departures (Lifestyle publication distributed exclusively to American Express Centurion and Platinum card holders)*

*Wall Street Journal (Leading business publication that reaches an affluent and sophisticated audience)*

*Daily Beast Digital news outlet with high-visibility amongst Millennial market, and who are expanding their food and wine coverage (4.5M UMV)*



# BRAND BUILDING

## MEDIA TARGETS

### News outlets in Key Markets

New York Times, Los Angeles Times, San Francisco Chronicle, Toronto Star, Vancouver Sun, Washington Post

### Lifestyle

*Cosmopolitan, Well + Good, Marie Claire, Vogue, Architectural Digest, Good Housekeeping, Elle, Refinery 29, Vanity Fair, Woman's Day, TIME, Reader's Digest, People Magazine, INSTYLE, and more*





# BRAND BUILDING

## PR INITIATIVES

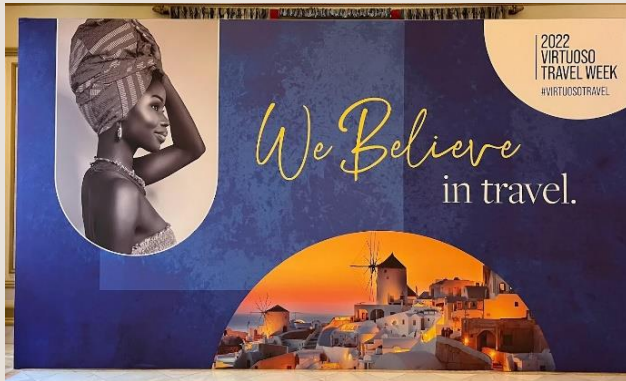
- Proactive pitching efforts around new openings and experiences
- Story angle ideation around premier product and media's interests
- Famil opportunities
- Development of In-market media events
- Attendance at In-market media conferences
- Coordination of Luxury Brand Partnerships

# BRAND BUILDING





# BRAND BUILDING



# SUPPORTING CONVERSION



TOURISM  
AUSTRALIA





# TIMELINE

## SATC AMERICAS

### 2022-33 Activity Calendar

ACTIVITY	2022						2023					
	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MARCH	APRIL	MAY	JUNE
<b>TRAVEL TRADE</b>												
<b>Trade Campaigns</b>												
Tourism Australia One Voice Trade Campaigns												
Virtuoso		VTW (Las Vegas)										
<b>Trade Events</b>												
Americas Marketplace		Aug 7-8, Los Angeles										
DUA Roadshow		Aug 1-4										
Swain Bonding		Aug 5-6, Philadelphia										
USTOA Annual Conference												
ATE												TBC
<b>Famils</b>												
Famils (Groups & Individual)												
T + L TAB famil												
<b>CONSUMER DIRECT</b>												
Tourism Australia One Voice Trade Campaigns												
<b>MEDIA &amp; PR</b>												
Tourism Australia One Voice Media												
Media Famils												
Wine Media Dinner												
Luxury luggage partnership												
IMM												
<b>OTHER</b>												
GMM												



# TIPS FOR THE NORTH AMERICAN MARKET





# TRAVEL TREND FORECAST

- **Nature is Luxury** - hotels are being designed around outdoor programming
- **Demand for private travel**- increasing as family members continue to plan reunion
- **Body Inclusive Amenities** – from accessible tour options to plus-size hotel robes, tourism products need to be amenable to all body types and sizes
- **The greenwashing effect** – Many Companies investing more resources in marketing sustainable efforts than making an impact
- **Purposeful travel continues to inspire** - 57% of Americans say they want to leave the places they visit better than when they arrived







TIPS FROM THOSE ON-THE-GROUND





## MEDIA TIPS

Media are interested in learning about:

- What's **new** and **noteworthy** in the destination; **historic** events; **trends**
- Sustainable practices and tangible actions taken by travel partners
  - Wildlife conservation and regenerative travel experiences
  - Authentic Indigenous/Aboriginal experiences and how travelers can have an immersive and respectful experience
- Outdoor adventure including hiking, biking, diving, and watersports
- Diversity and inclusion in the travel industry including but not limited to tour operators, hotel owners, chefs, and winemakers
- Your story and how it's different from other products



## MARKETING TIPS

- Since sustainability and regenerative travel are hot topics and hold influence on travel decisions, build in opportunities to “give back”/volunteer as part of the experience
- Make it experiential & active: “Doing”, not just “Seeing”
- Speak to the unique Australian experience your product will provide, and find ways to connect with the community (i.e. Aboriginal component)



## MARKETING TIPS

- Consider shorter-duration itineraries
- Diversity and inclusion is increasingly important, so try to reflect this in marketing materials
- Refrain from engaging in political discussion
- Keep us informed with product news



# SATC AMERICAS TEAM

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