CAPE WILLOUGHBY
KANGAROO ISLAND

2023 INTERNATIONAL MARKET UPDATE

NEW ZEALAND

MARKET OVERVIEW

Results based on year ending June 2023

- New Zealand is South Australia's third largest inbound market and the total expenditure has increased 36% on pre-Covid levels.
- 75% of Kiwis will book their South Australia holiday direct with the operator, while 25% will use a traditional travel agent.
- Key demand-driving experiences include food and wine, events and festivals, Murray River cruising and houseboating and other distinctive landscapes on Adelaide's doorstep.
- 52% of visits are for the purpose of Holiday, 36% for Visiting Friends and Relatives (VFR).
- Typical peak travel periods are Spring (September – November) and Autumn (March – May).
- 95% of New Zealand visitors to South Australia have been to Australia before.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2023

VISITORS

38k

NIGHTS

364k

EXPENDITURE

$61m

AVERAGE SPEND

$169 PER NIGHT

$1,598 PER VISITOR

AVERAGE LENGTH OF STAY

9 nights

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#3 FOR VISITORS

#6 FOR NIGHTS

#5 FOR EXPENDITURE

AIR ACCESS

NEW ZEALAND

Key Airline

Air New Zealand (NZ) direct from Auckland

Multiple airlines offering connections via other Australian Airports

FAST FACTS & FIGURES

Annual average of 2017-2019 figures

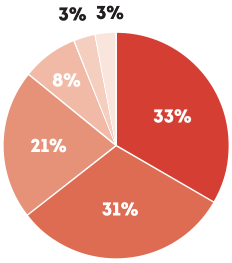
NEW ZEALAND	HOLIDAY	VFR^	BUSINESS	OTHER	TOTAL
Visits (SA)	20	14	7	3	41
Visits (AUS)	496	587	228	159	1,264
Nights (SA)	127	132	33	101	394
Nights (AUS)	3,754	5,736	1,094	2,451	13,035
ALOS^ - Nights (SA)	6	9	5	34	10
ALOS^ - Nights (AUS)	8	10	5	15	10
Expenditure					**$49m**

(000's)

^ 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

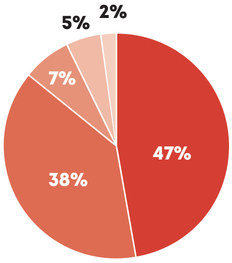


Visitor accommodation type (in SA)

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

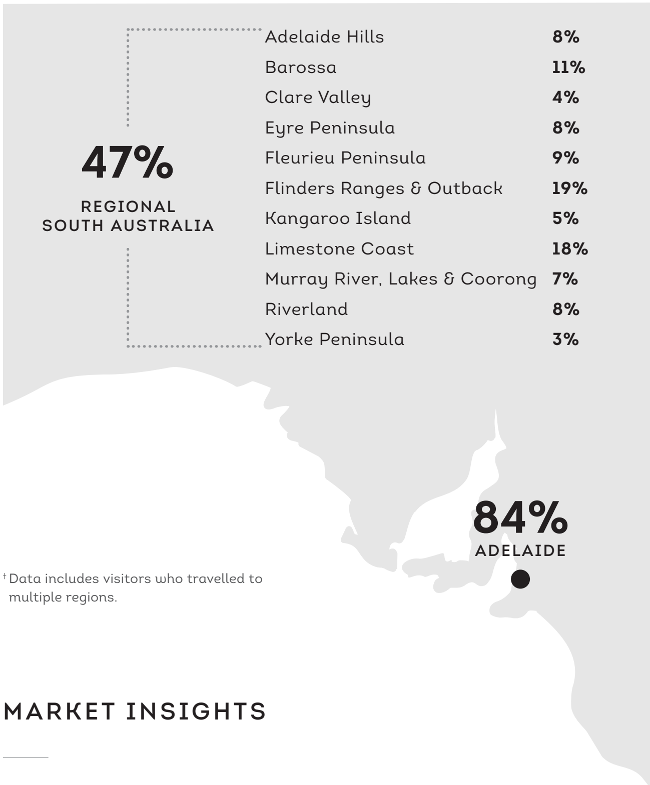
Travel party description (to SA)

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



VISITOR DISPERSAL†

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



Adelaide Hills	8%
Barossa	11%
Clare Valley	4%
Eyre Peninsula	8%
Fleurieu Peninsula	9%
Flinders Ranges & Outback	19%
Kangaroo Island	5%
Limestone Coast	18%
Murray River, Lakes & Coorong	7%
Riverland	8%
Yorke Peninsula	3%

† Data includes visitors who travelled to multiple regions.

IMPORTANCE FACTORS

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

59%
Safety and security
VS. **53%** GLOBAL AGGREGATE

47%
Value for money
VS. **37%** GLOBAL AGGREGATE

40%
Friendly citizens
VS. **31%** GLOBAL AGGREGATE

36%
Good food and wine
VS. **37%** GLOBAL AGGREGATE

31%
World class beauty and nature
VS. **40%** 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.

MARKET INSIGHTS

- A strong focus remains on driving consumer demand through branding activities via TV, digital and PR platforms. Key calls to action are driving visits to southaustralia.com where Kiwis can engage with South Australia content and link to booking partners.
- The South Australian Tourism Commission (SATC) continues to develop its strong relationship with Air New Zealand, working to drive passenger numbers to South Australia.
- The SATC works closely with key travel trade partners to ensure South Australian holiday packages and deals are regularly promoted to Kiwi holiday planners.
- New Zealand travellers are quite comfortable booking and travelling independently, therefore the SATC contributes a significant proportion of its marketing budget towards consumer direct marketing.
- New Zealand travellers seek experiences different from those available to them in their home country. For example, culinary/wine experiences incorporating historic buildings and local culture, houseboating and river cruising on the Murray River.
- Most New Zealand consumers will research and book holidays to Australia online, therefore a quality website is vital.
- Traveller sentiment has evolved with an increase of demand for luxury/high end products/experiences and a shift towards 'new and different' destinations.

TARGET MARKET PROFILE

Primary

High yield experience seekers aged 35-65 years (not yet retired) travelling without children and spent more than $2,000 on their last trip.

Secondary§

Younger professional, younger couples/groups of friends aged 35 - 45 years.

§ Secondary market identified as an opportunity market with growth potential.

INFORMATION SOURCES

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

42%	26%	22%	16%	15%	11%	4%
Internet	Previous visit(s)	Friend/relative in Australia or visited	Other	Travel agent	Did not get any information	Travel book or guide

TOP 3 BARRIERS TO VISITING AUSTRALIA

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

Other places I would prefer to go

Already been there and want to see other places

It's easy to put off for another time

CONTRACTING & BROCHURE TIMES

Contracting runs June to September, with the bulk of contracts received in July and August. Very few partners are printing brochures, with most opting for online channels.

NZ CHECKLIST

Consider the following points when targeting travellers from New Zealand:

- **Demonstrate accessibility from Adelaide** or other well known regions for Kiwis (eg the Riverland is a 3 hour drive from Adelaide via the Barossa).
- **Highlight food and wine as a part of the overall experience** (eg sunset canapés in the Outback).
- **Educate Kiwis on what a SA holiday 'looks like.'** Close the loop with itineraries and packages that make planning easy.
- **Focus on distinctive experiences or imagery** that can't be confused for elsewhere in New Zealand or Australia.

KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
GO Holidays	• Helloworld • The Travel Brokers • NZ Travel Brokers • Williment Travel
House of Travel Product	• House of Travel
Infinity Holidays	• Flight Centre • Travel Associates • Travel Managers • World Travellers • First Travel Group
ANZCRO	• House of Travel • Independents and Brokers

TOP ONLINE TRAVEL AGENTS#

Booking.com

airbnb

Tripadvisor

TOP TRAVEL RESOURCES

stuff

The New Zealand Herald

AIR NEW ZEALAND

On average only 5% of Kiwis will book SA through an OTA as they are used more for research than actual bookings.

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SOUTH AUSTRALIA

Government of South Australia

South Australian Tourism Commission

Source: International Visitor Survey Dec 17, Dec 18, Dec 19 and June 23 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 23. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2017 to Dec 2019. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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 October 2023.