UNITED KINGDOM

INTERNATIONAL MARKET UPDATE 2025

MARKET OVERVIEW

- The United Kingdom (UK) is South Australia's largest inbound market and is ranked 2nd for expenditure as of June 2025.
- 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. 4% of consumers in the UK now use AI tools for travel planning and research.
- 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.
- 40% of visits are for the purpose of Holiday, 42% for Visiting Friends & Relatives (VFR).*
- 64% of UK visitors to South Australia have been to Australia before.*

SNAPSHOT OF CURRENT STATISTICS – JUNE 2025

VISITORS

62k

NIGHTS

1.5m

AVERAGE LENGTH OF STAY

24 nights#

EXPENDITURE

$141m

AVERAGE SPEND

$95 per night

$2,289 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)
- Multiple airlines offering connections via other Australian airports

FAST FACTS & FIGURES

Data is an annual average over 2 years ending June 2024-June 2025

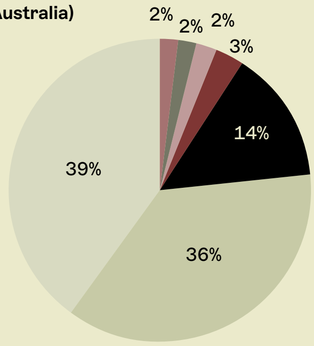
UNITED KINGDOM	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	35,000	23,000	5,000	4,000	59,000
VISITS (AUS)	321,000	379,000	46,000	110,000	607,000
NIGHTS (SA)	501,000	477,000	38,000	312,000	1,328,000
NIGHTS (AUS)	9,711,000	8,203,000	677,000	3,862,000	22,453,000
ALOS - NIGHTS (SA)	14	21	7	74	22
ALOS - NIGHTS (AUS)	30	22	15	35	37
EXPENDITURE (SA)					$125m

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.
#A HIGH AVERAGE DUE TO VFR.

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

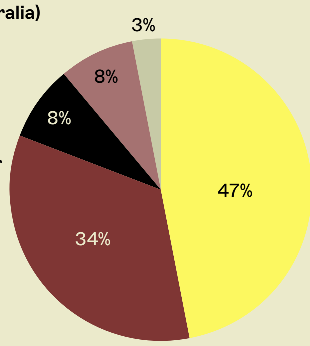
Visitor accommodation type (in South Australia)

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



Travel party description (to South Australia)

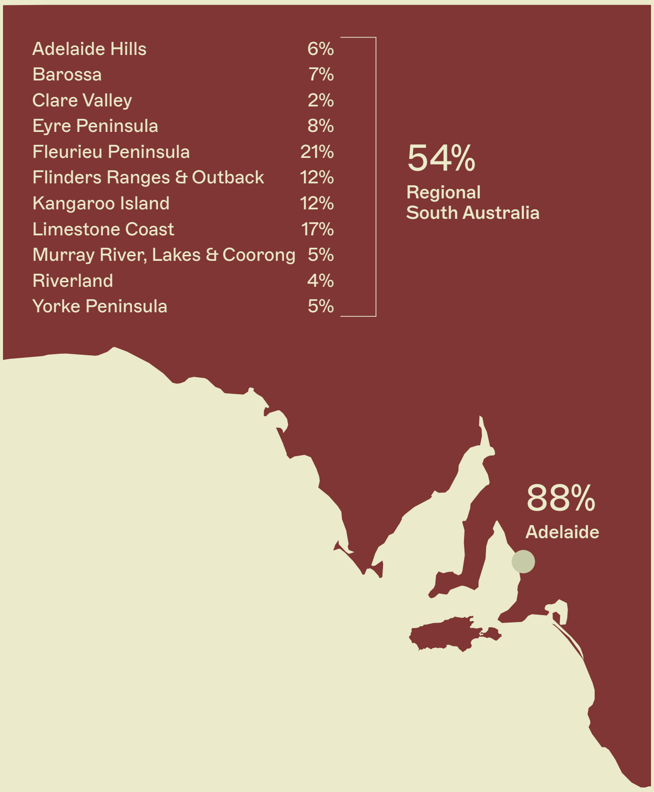
- Travelling alone
- Adult couple
- Family group - parents and children
- Friends or relatives travelling together
- Other travel party



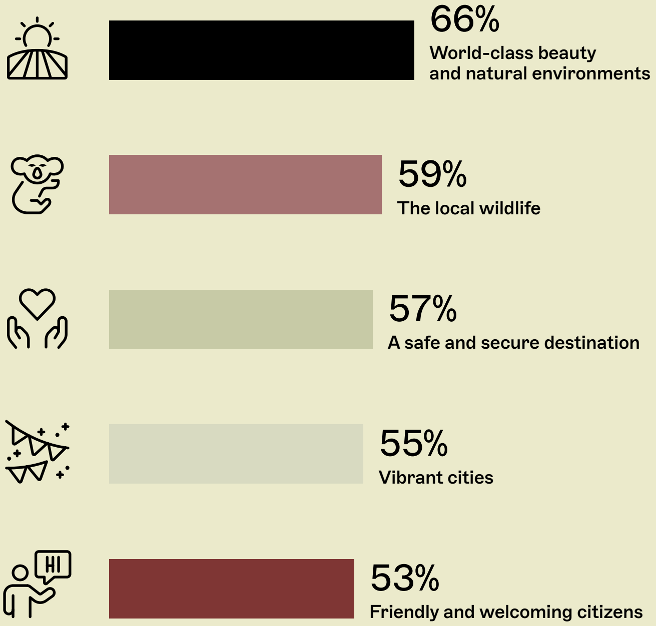
MARKET INSIGHTS

- 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 for the first time this year.

VISITOR DISPERSAL*+



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.
+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.

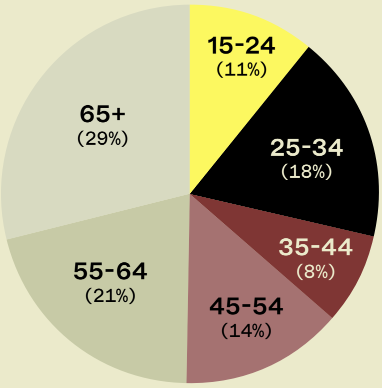
SECONDARY§

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

BOOKING PREFERENCES

31%	48%	31%	28%	11%	2%
Online Travel Agent (eg. Expedia)	Direct with Airline	Retail Travel Agent/ Tour Operator	Direct with Accommodation	Direct with Experience Provider	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 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.

§THE FREE TRADE AGREEMENT HAS INCREASED THE AGE TO 35.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.

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

TOP TRAVEL RESOURCES

The Telegraph

THE TIMES

Wanderlust

National Geographic TRAVELLER

Daily Mail

TOP ONLINE TRAVEL AGENTS

Expedia

Skyscanner

Tripadvisor

Booking.com

secret Escapes

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SOUTH AUSTRALIA

Government of South Australia
South Australian Tourism Commission