

NORTH AMERICA

INTERNATIONAL MARKET UPDATE 2026

MARKET OVERVIEW

- The North American market incorporates both the USA and Canada.
- The USA is South Australia's second largest market for visitation and Canada is the eighth largest as of March 2026.
- 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.*
- 54% of visits are for the purpose of Holiday, 38% for Visiting Friends and Relatives (VFR).*



FAST FACTS & FIGURES

Data is USA and Canada combined and an annual average over 2 years ending March 2025 - March 2026

NORTH AMERICA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	31,000	22,000	6,000	4,000	57,000
VISITS (AUS)	481,000	330,000	107,000	168,000	848,000
NIGHTS (SA)	260,000	412,000	49,000	121,000	841,000
NIGHTS (AUS)	6,115,000	6,194,000	1,183,000	3,367,000	16,858,000
ALOS - NIGHTS (SA)	8	19	8	30	15
ALOS - NIGHTS (AUS)	13	19	11	20	20
EXPENDITURE (SA)	\$115m				

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*AN ANNUAL AVERAGE OF USA AND CANADA DATA OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.

SNAPSHOT OF CURRENT STATISTICS – MARCH 2026

VISITORS ● USA ● Canada

 48k | 15k

NIGHTS

 623k | 255k

AVERAGE LENGTH OF STAY

 13 | 17

EXPENDITURE

 \$94m | \$37m

AVERAGE SPEND

 Per night Per visitor
\$151 | \$147 \$1,960 | \$2,534

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 For visitors For nights For expenditure
#2 | #8 #6 | #16 #6 | #14

AIR ACCESS

DIRECT AIRLINE

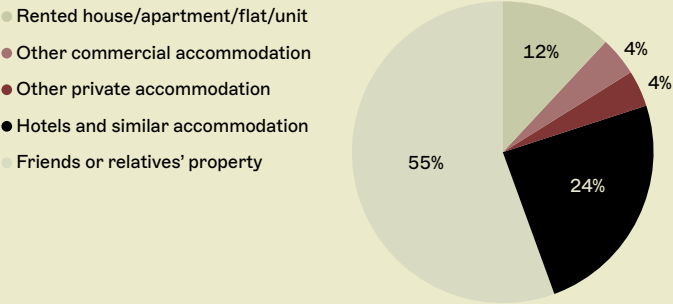
- United Airlines (UA) flies direct from San Francisco to Adelaide. The route operates seasonally from December through to February and is scheduled to return in December 2026.

KEY CONNECTING AIRLINES

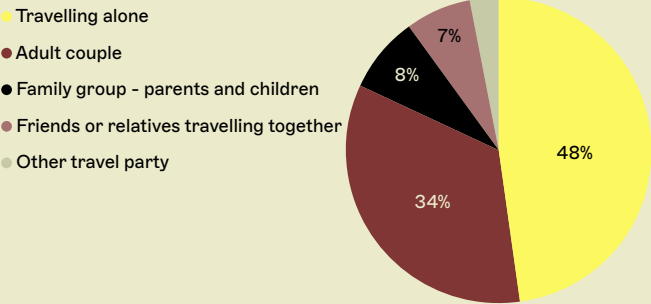
- Qantas Airways (QF)
- American Airlines (AA)
- Air New Zealand (NZ)
- Fiji Airways (FJ)
- Air Canada (AC)
- Multiple airlines offering connections via other Australian airports

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

Visitor accommodation type (in South Australia)



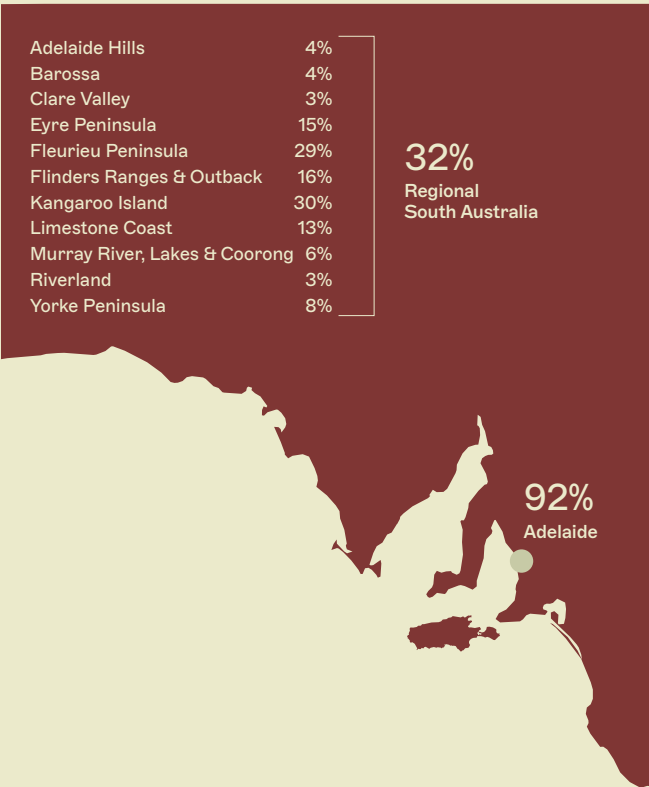
Travel party description (to South Australia)



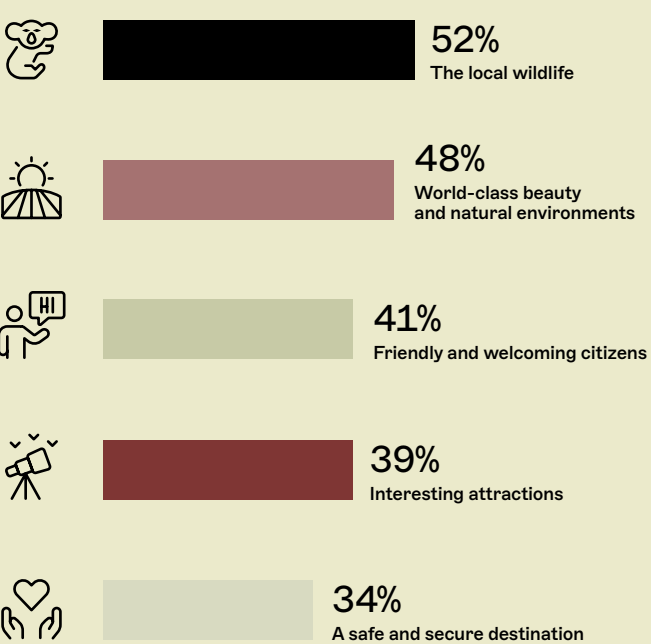
MARKET INSIGHTS

- 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.
- Demand for trusted travel advisors continues to strengthen, with 94% of USTOA tour operators expecting advisor bookings to increase or remain stable through 2026 as travellers seek expert guidance to navigate increasingly complex travel planning. Demand remains resilient, with 68% of operators reporting sales growth in 2025 and 58% seeing an increase in traveller numbers.
- Travellers are prioritising premium experiences while remaining cautious in their booking behaviour, with strong growth in luxury travel demand and higher per-trip spending expected in 2026. At the same time, consumer hesitancy is increasing, resulting in shorter booking windows and a greater need for flexible, value-driven travel offerings.
- 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.
- Astro-tourism is an emerging growth segment, with the global market forecast to expand by an average of 12.7% annually through 2034, driven by growing demand for noctourism experiences and dark-sky destinations.

VISITOR DISPERSAL**



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



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



29% | 32%
Online Travel Agent
(eg. Expedia)



52% | 52%
Direct with Airline



29% | 27%
Retail Travel Agent/
Tour Operator



29% | 23%
Direct with
Accommodation

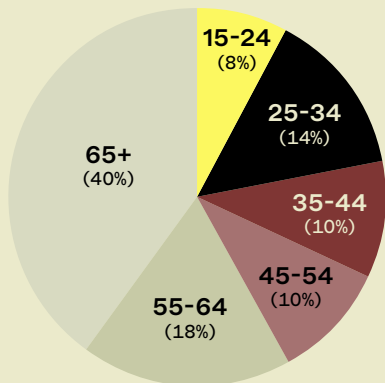


10% | 8%
Direct with
Experience Provider



2% | 4%
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 travel 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 MARCH 2025-MARCH 2026.
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