2024 INTERNATIONAL MARKET UPDATE

NEW ZEALAND

MARKET OVERVIEW

Results based on year ending June 2024

- New Zealand is South Australia's second largest inbound market and the total expenditure has increased 48% on pre-Covid levels.
- Kiwis will book through a variety of sources, and due to their familiarity with Australia they are comfortable booking directly with operators.
- Key demand-driving experiences include food and wine, events and festivals, Murray River cruising and houseboating and other distinctive landscapes on Adelaide's doorstep.
- 53% of visits are for the purpose of Holiday, 33% for Visiting Friends and Relatives (VFR).
- Typical peak travel periods are Spring (September – November) and Autumn (March – May).
- 94% of New Zealand visitors to South Australia have been to Australia before.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

VISITORS

47k

NIGHTS

378k

EXPENDITURE

$67m

AVERAGE SPEND

$177 PER NIGHT

$1,436 PER VISITOR

AVERAGE LENGTH OF STAY

8 nights

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#2 FOR VISITORS

#10 FOR NIGHTS

#7 FOR EXPENDITURE

AIR ACCESS

NEW ZEALAND

Key Connecting Airlines

Air New Zealand (NZ)
direct from Auckland

Multiple airlines offering connections via other Australian Airports

FAST FACTS & FIGURES

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

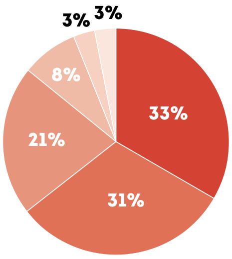
NEW ZEALAND	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	20	14	7	3	41
Visits (AUS)	496	587	228	159	1,264
Nights (SA)	127	132	33	101	394
Nights (AUS)	3,754	5,736	1,094	2,451	13,035
ALOS - Nights (SA)	6	9	5	34	10
ALOS - Nights (AUS)	8	10	5	15	10
Expenditure					**$49M**

(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

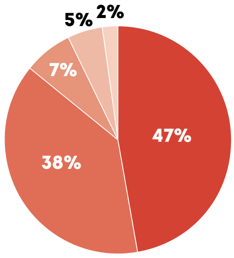


Visitor accommodation type (in SA)

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

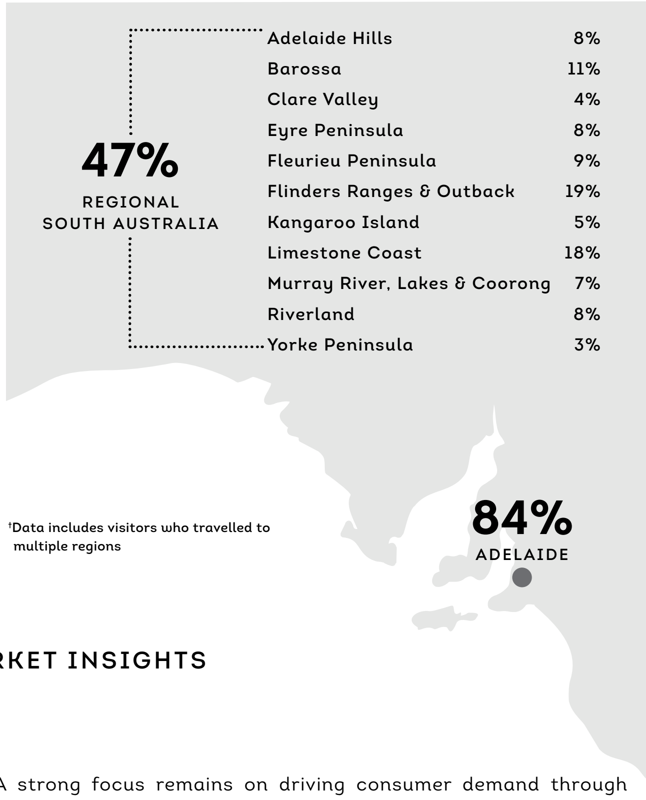
Travel party description (to SA)

- 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 On Demand, 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 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 indetified as an opportunity market with growth potential.*

BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024

53%	32%	30%	28%	16%	4%
Direct with Airline	Retail Travel Agent/ Tour Operator	Direct with Accommodation	Online Travel Agent (e.g. Expedia)	Direct with Experienced Provider	Other

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.

NEW ZEALAND 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 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 First Travel Group
House of Travel Product	House of Travel
Infinity Holidays	Flight Centre Travel Associates Travel Managers World Travellers
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.

CONTACT

ADELAIDE

Martin Kaesler
Manager, Global Markets
martin.kaesler@sa.gov.au

NEW ZEALAND

Stacey Kerr
Regional Manager, New Zealand
stacey.kerr@adelaide.com

SOUTH AUSTRALIA

Government of South Australia
South Australian Tourism Commission

Disclaimer: Source: International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).