2023 INTERNATIONAL MARKET UPDATE

UNITED KINGDOM

MARKET OVERVIEW

Results based on year ending June 2023

- United Kingdom is South Australia's largest inbound market with visitor expenditure increasing 32% on pre-Covid levels.
- UK visitors are affluent experience seekers who generally travel without children looking for authentic and immersive experiences.
- The majority of UK visitors will book their travel to Australia through a travel agent due to distance, security, and complexity in booking many components. Research and planning however happen online by consumers before seeking advice from travel agents.
- 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 due to social media. 'Escaping the everyday' is a non-negotiable when it comes to a holiday and sustainable practises are expected by consumers.
- 42% of visits are for the purpose of Holiday, 56% for Visiting Friends & Relatives (VFR).
- 69% of UK visitors to South Australia have been to Australia before.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2023

VISITORS

56k

NIGHTS

924k

EXPENDITURE

$95m

AVERAGE SPEND

$103 PER NIGHT

$1,707# PER VISITOR

AVERAGE LENGTH OF STAY

17 nights#

#A high average due to VFR.

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#1 FOR VISITORS

#3 FOR NIGHTS

#4 FOR EXPENDITURE

AIR ACCESS

UNITED KINGDOM

Key Connecting Airlines

Qatar Airways (QR)

Singapore Airlines (SQ)

Malaysia Airlines (MH)

Multiple airlines offering connections via other Australian Airports

FAST FACTS & FIGURES

Annual average of 2017-2019 figures

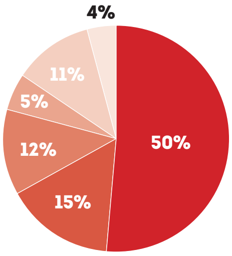
UNITED KINGDOM	HOLIDAY	VFR^	BUSINESS	OTHER	TOTAL
Visits (SA)	37	30	5	3	67
Visits (AUS)	392	427	64	101	683
Nights (SA)	264	554	70	106	994
Nights (AUS)	9,503	8,364	840	3,150	21,857
ALOS^ - Nights (SA)	7	18	14	35	15
ALOS^ - Nights (AUS)	24	20	13	31	32
Expenditure					**$81M**

(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

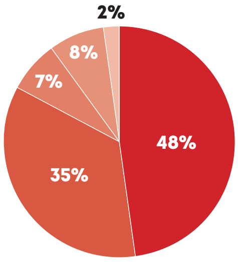


Visitor accommodation type (in SA)

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

Travel party description (to SA)

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

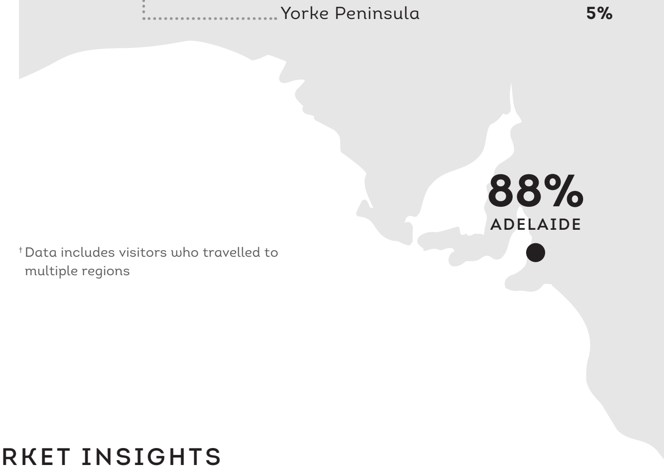


VISITOR DISPERSAL†

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

61%
REGIONAL SOUTH AUSTRALIA

Adelaide Hills	5%
Barossa	7%
Clare Valley	1%
Eyre Peninsula	11%
Fleurieu Peninsula	17%
Flinders Ranges & Outback	20%
Kangaroo Island	9%
Limestone Coast	17%
Murray River, Lakes & Coorong	4%
Riverland	4%
Yorke Peninsula	5%



† Data includes visitors who travelled to multiple regions

IMPORTANCE FACTORS

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

55%
Safety and security
VS. **53%** GLOBAL AGGREGATE

42%
Value for money
VS. **37%** GLOBAL AGGREGATE

41%
Good food and wine
VS. **37%** GLOBAL AGGREGATE

38%
Friendly citizens
VS. **31%** GLOBAL AGGREGATE

32%
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

- The SATC continues to foster strong relationships with key distribution partners, inbound tour operators 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 is key, providing depth into the authenticity and diversity of the state and experiences. The SATC undertakes integrated co-operative campaigns with key partners who have strong digital marketing channels, are committed to include consumer facing activity, and have the ability to convert demand.
- Luxury travel is set to outperform the market while tailor-made adventures and unique experiences in 'new destinations' are in great demand.
- UK consumers are seeking value for money and quality, but would still prefer to pay a higher price than get a lesser experience – they would rather travel less often than feel like they were getting a 'watered-down' lower quality holiday.
- South Australia provides distance from the masses and intimate holiday experiences with non-touristy locations in favour of overpopulated regions and experiences operated by large commercial entities.
- Highlight sustainability practises and credentials as UK travellers consider sustainability as an expected not an extra.
- UK is the largest market for working holiday makers, and an important segment for length of stay and dispersal.

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 look for local food and wine experiences. Nature-based experiences are important when choosing a holiday destination and they disperse widely throughout Australia.

Secondary

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

[§]The free trade agreement has increased the age to 35.

INFORMATION SOURCES

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

47%	Internet
47%	Friend/relative in Australia or visited
32%	Previous visit(s)
15%	Other
13%	Travel agent
10%	Travel book or guide
7%	Did not get any information

CONTRACTING & BROCHURE TIMES

Brochure contracting and production takes place from July to October for release in November/December. Brochure validity is 1 April – 31 March. Many companies include product on websites.

TOP 3 BARRIERS TO VISITING AUSTRALIA

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

It is too far to travel

Expensive airfares

High cost of travelling around

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.

KEY TRADE PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
• Barrhead Travel • Audley Travel • Gold Medal • Lotus/Dial A Flight • Trailfinders • Travelbag • Cox & Kings	**ATS Pacific**
• Destinology • Discover the World • Freedom Destinations • If Only • Lotus/Dial A Flight • Original Travel • Premier Holidays • Steppes Travel • Trailfinders • Wexas	**Pan Pacific**
• Turquoise Holidays • Travel Counsellors • Travel Nation • First Class Holidays • Hays Travel • Prestige Travel • ITC Luxury Travel	**Southern World**
• Elegant Resorts • ITC Luxury Travel	**Southern Crossings**
• Kuoni • Titan Travel	**AOT**
• Audley Travel	**Goway**
• Cox & Kings	**Direct through A&K**
• Flight Centre	**Direct/Inhouse**
• Trailfinders	**Direct**
• Abercrombie & Kent	**Direct/Inhouse**

TOP TRAVEL RESOURCES

The Telegraph

THE TIMES

Wanderlust

Daily Mail

NATIONAL GEOGRAPHIC TRAVELLER

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

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).