

TOURISM AUSTRALIA UPDATE

Kristy Malapa – June 2025



TODAY'S UPDATE



Recap on Tourism Australia markets and focus



State of play and outlook



Future trends and research



How to get involved

TOURISM AUSTRALIA MARKETS AND FOCUS



TOURISM AUSTRALIA'S FY26 STRATEGIC PRIORITIES

CREATE DEMAND

CAMPAIGN

EVENTS

DISPERSAL

CONVERT DEMAND

PARTNERSHIPS

DISTRIBUTION

SECTOR INTELLIGENCE

CHAMPION INDUSTRY

INSIGHT

LEADERSHIP

TARGET AUDIENCES

HIGH YIELDING TRAVELLERS

Purpose of trip: Holiday & VFR

Spend per night: >\$240

Total trip spend: >\$2,400 (variable by market and total outbound spend, dollars as of March 2024)

Star: USA, China, United Kingdom, India, Germany, Japan, South Korea

Sold Deliverers: Hong Kong, Singapore, Indonesia, Malaysia, France, Canada, New Zealand, Italy, Vietnam

BUSINESS EVENTS

Purpose of trip: Business Event; Incentive and Association (B2B activity only)

Incentive: New Zealand, China, North America, India, Southeast Asia

Association: United Kingdom, Europe, North America

LUXURY

Spend per night: >\$1,200

Markets: USA, China, UK

WORKING HOLIDAY MAKERS

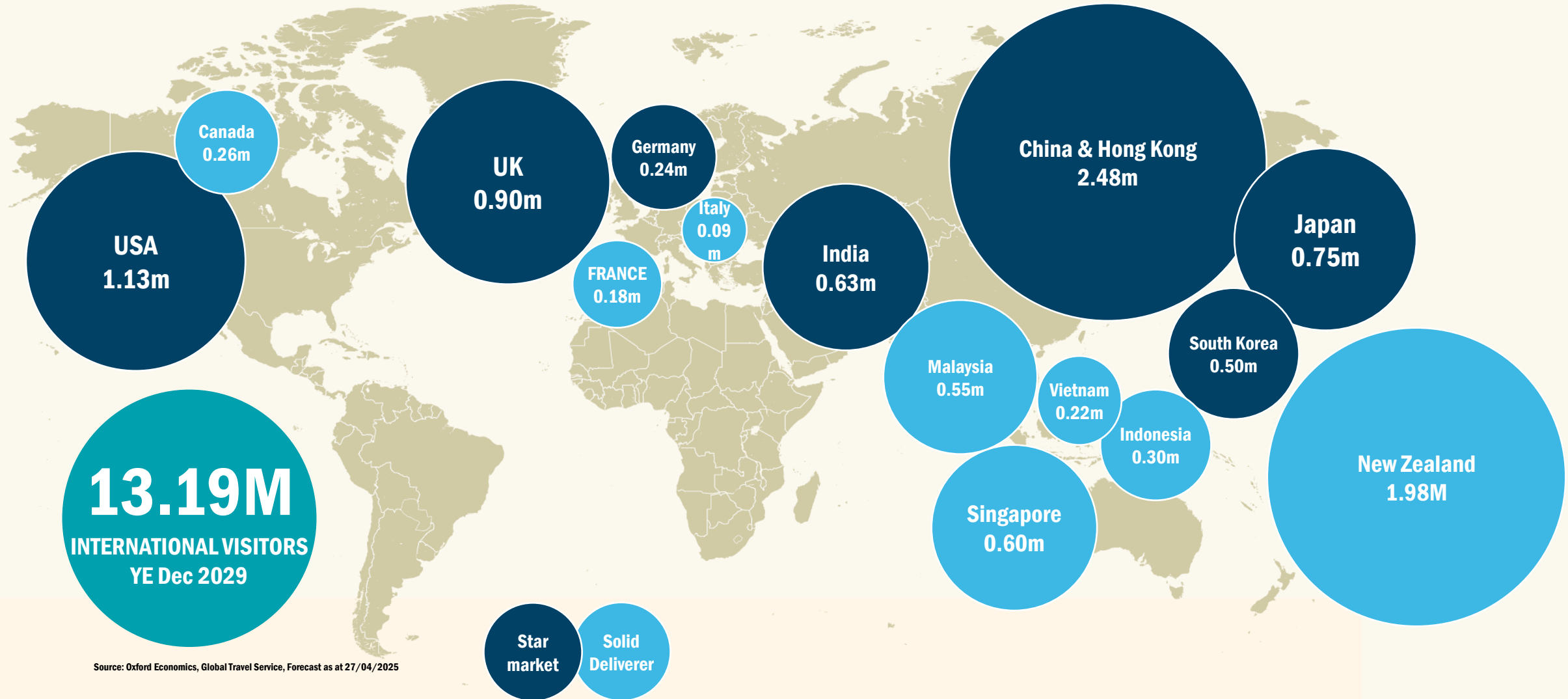
Purpose of trip: Working Holiday Maker Visa

Markets: UK, Ireland, France, South Korea



PRIORITY MARKETS

AUSTRALIA'S VISITATION OUTLOOK TO 2029



Source: Oxford Economics, Global Travel Service, Forecast as at 27/04/2025

CURRENT STATE OF PLAY

We are making good progress – with a lot to celebrate





**Total visitor expenditure
grew to a record**

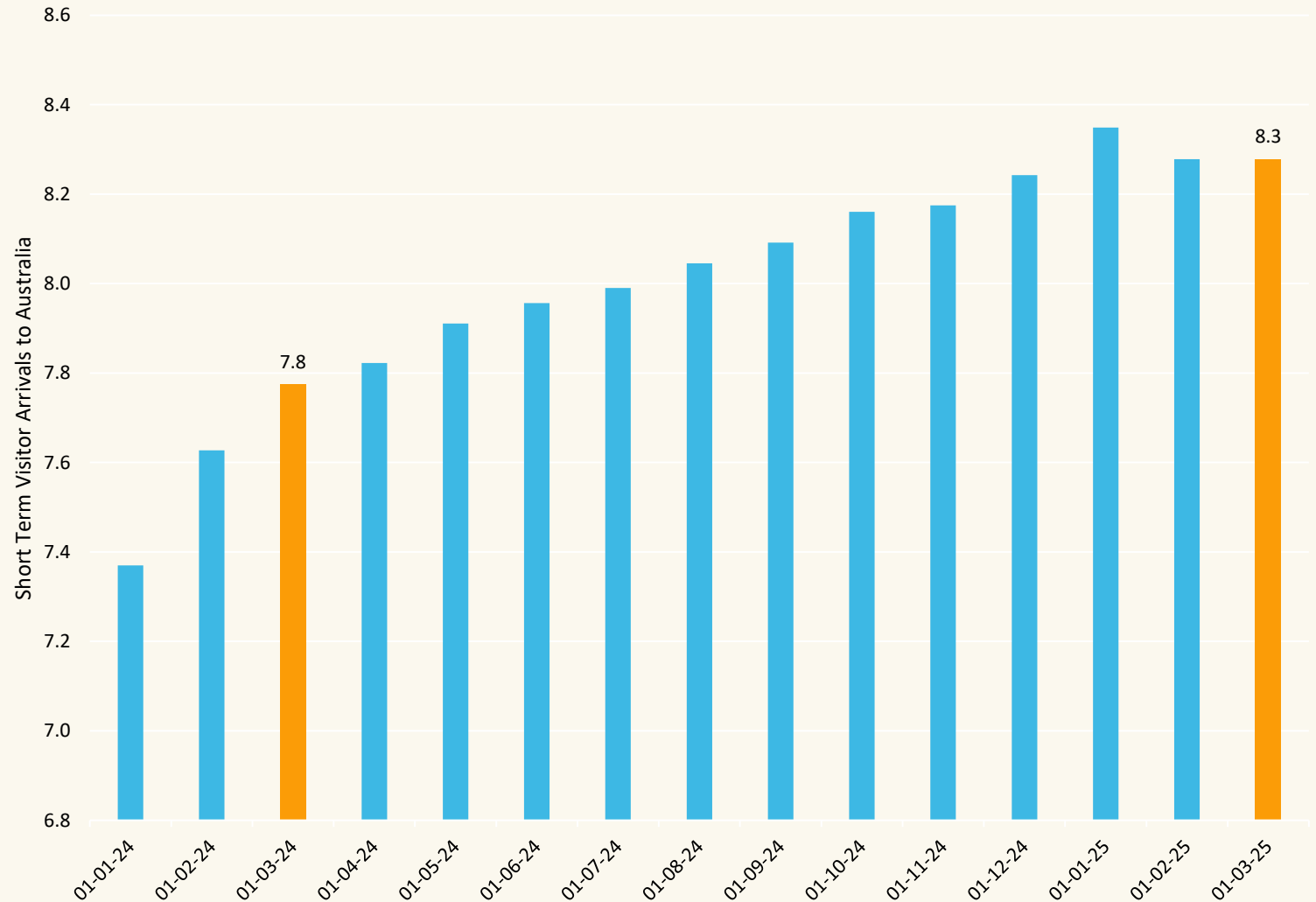
\$48.4

billion

Data source: Tourism Research Australia, International Visitors Survey, September 2024.

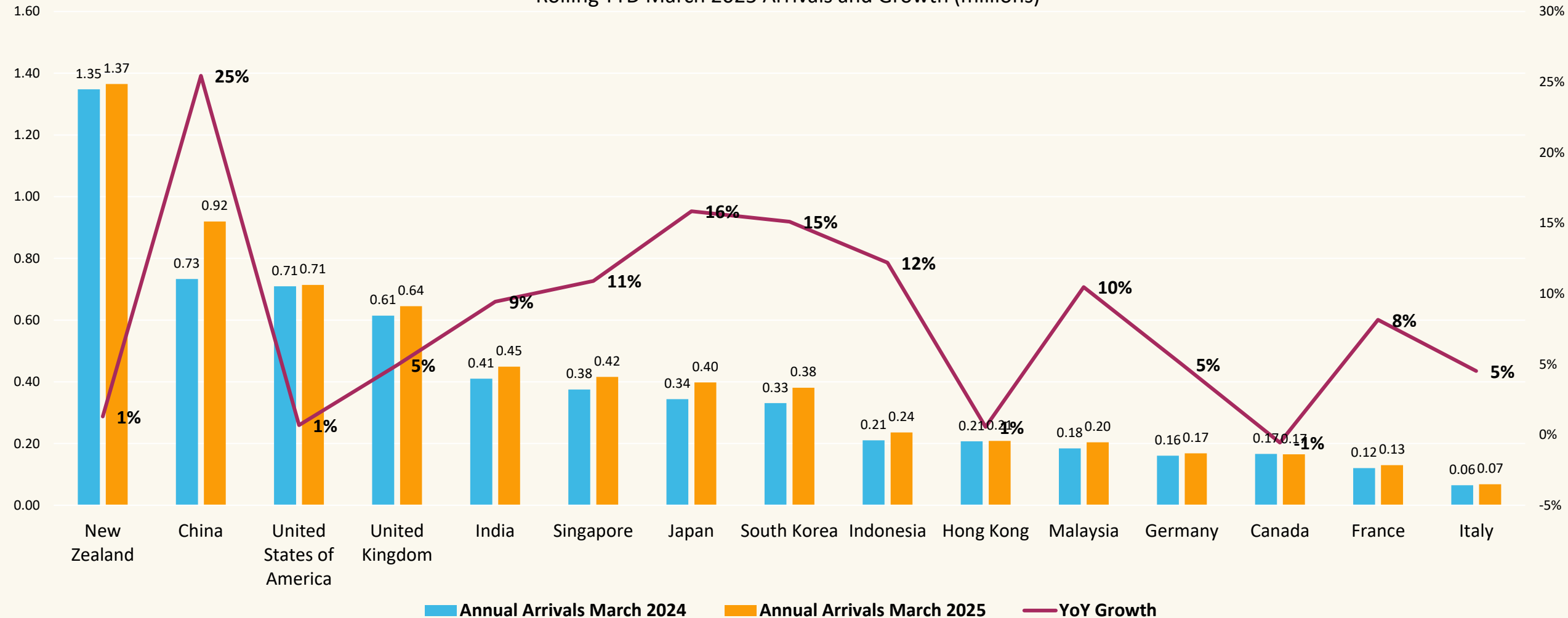
INTERNATIONAL ARRIVALS REACH 8.3M BY MAR 2025. 6% GROWTH FROM 2024.

Total international Short-Term visitors
Year to date data (millions)



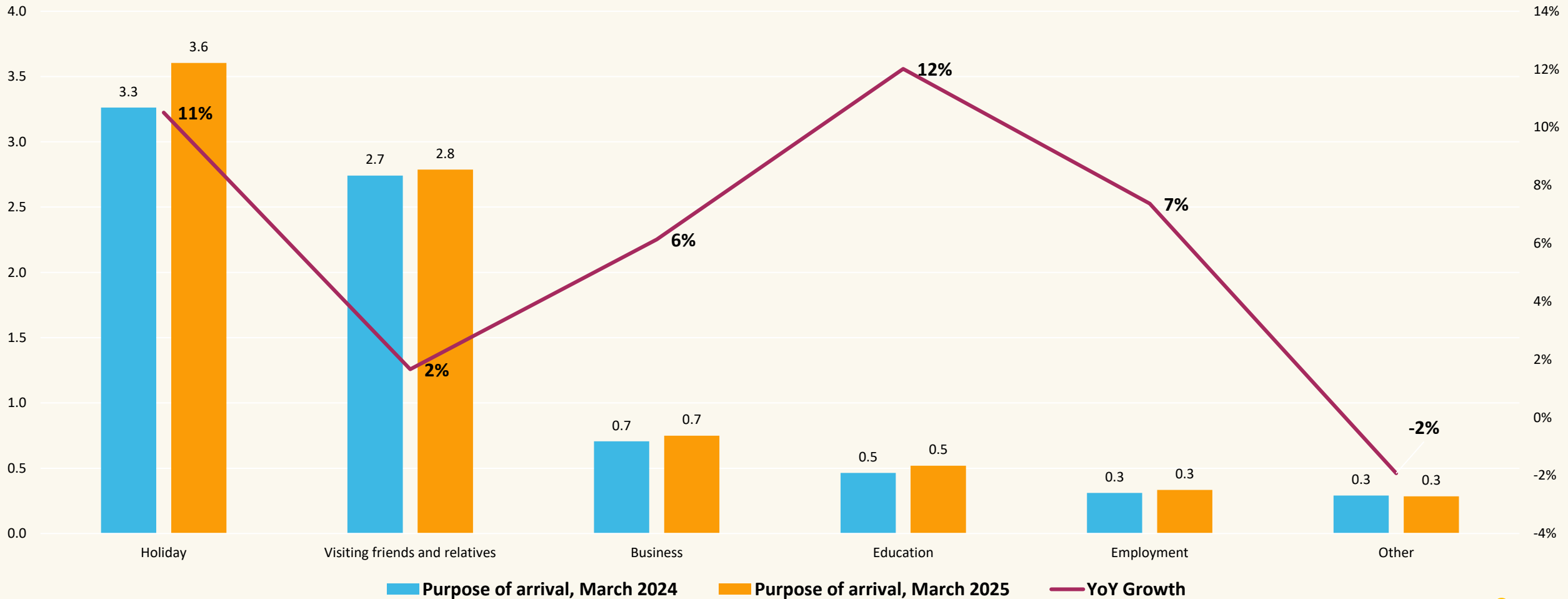
INTERNATIONAL ARRIVALS BY KEY MARKET

Total Short-Term Arrivals by TA Market
Rolling YTD March 2025 Arrivals and Growth (millions)

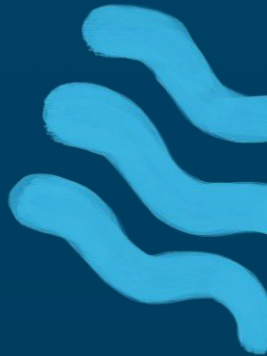


HOLIDAY MAKERS IN THE LEAD

Annual visitation by trip type
Year to March 2025 vs. March 2024 (millions)

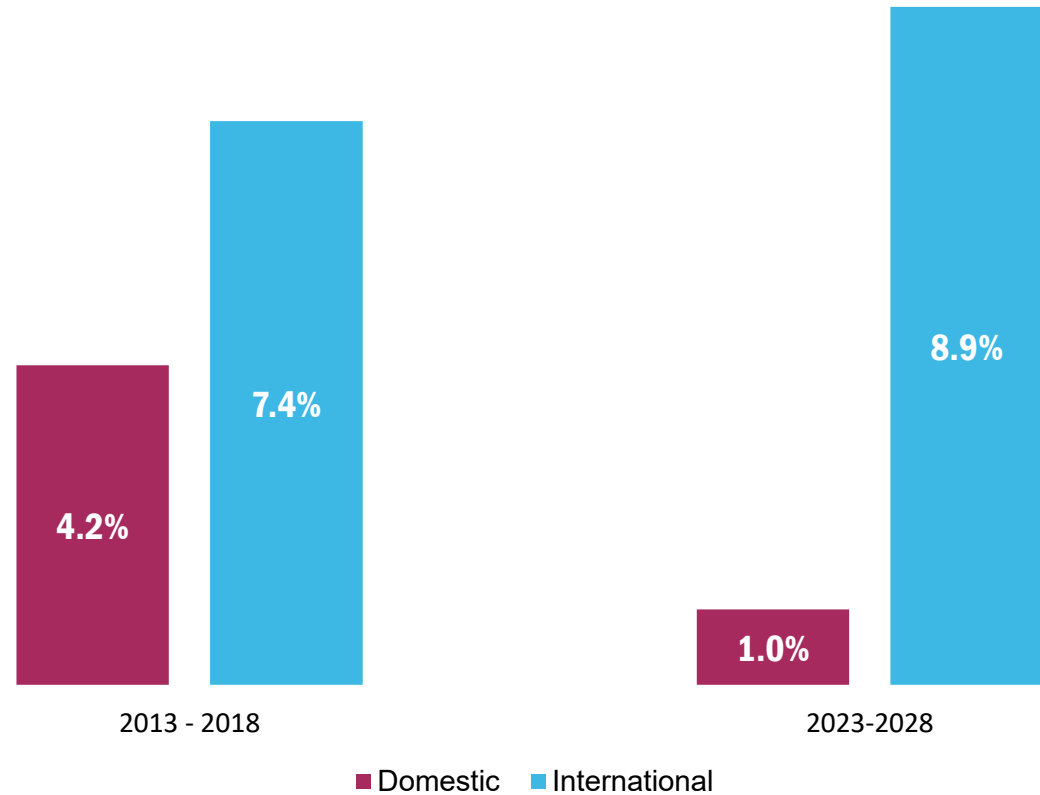


FUTURE TRENDS



WHILST DOMESTIC WILL CONTINUE TO ACCOUNT FOR THE BULK OF VISITORS, THE PACE OF GROWTH FOR INTERNATIONAL IS EXPECTED TO BE HIGHER

5-YEAR AVERAGE ANNUAL GROWTH RATES (%) DOMESTIC VS INTERNATIONAL
Expenditure in real terms



Source: Tourism Research Australia, Tourism forecasts for Australia 2023 to 2028



SIX MACRO TRENDS IMPACTING AUSTRALIA



THE RUN TO YIELD

Competition increasing at value, not the volume end of tourism



THE ASIAN CENTURY CONTINUES

While high volume markets remain China, US, UK, and NZ, Asian markets are growing quickly



EXPERIENCES ARE EVERYTHING

Breadth of experiences and journeys drive destination choice



MAJOR EVENTS RUNWAY

Australia has a wealth of upcoming events leading to Brisbane 2032



TRAVEL FOR GOOD

Rising demand for experiences that do good, not just feel good



PATHS TO PURCHASE

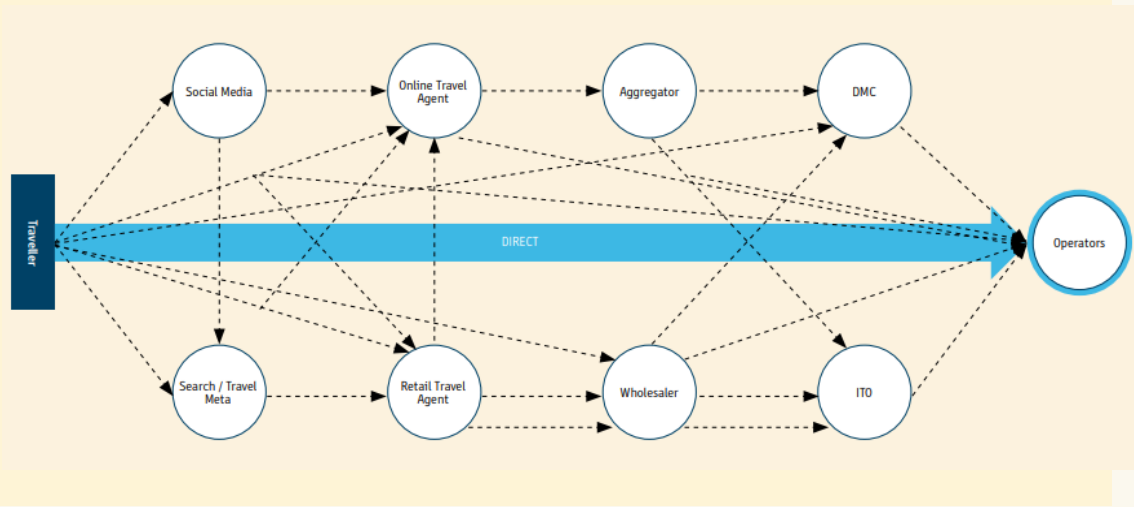
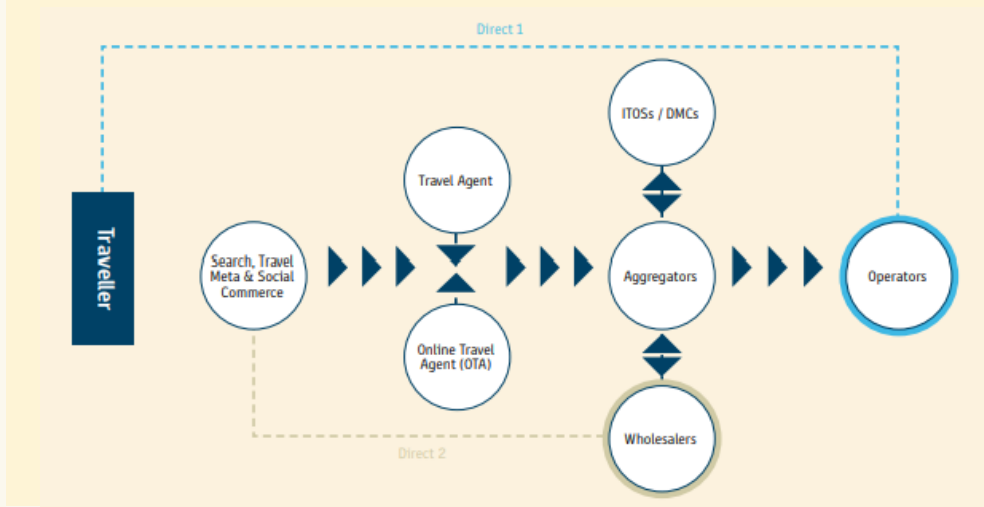
Travellers increasingly mixing and matching how they book, and with who

THE FUTURE OF DISTRIBUTION REPORT

AS AUSTRALIA IS A COMPLEX, LONG-HAUL AND INFREQUENTLY VISITED DESTINATION, DISTRIBUTION IS CRITICAL FOR CONVERSION

LEAD UP TO THE PANDEMIC

CURRENT STATE



**CONTINUING IMPORTANCE
OF DISTRIBUTION**

**THE COMPLEXITY OF
AUSTRALIA
CAN BE A BARRIER
WHICH DISTRIBUTION
HELPS TO OVERCOME**



FOUR MEGA THEMES SHAPE THE EVOLUTION OF DISTRIBUTION



**CHANNEL
PROLIFERATION**



**RISING
EXPECTATIONS**



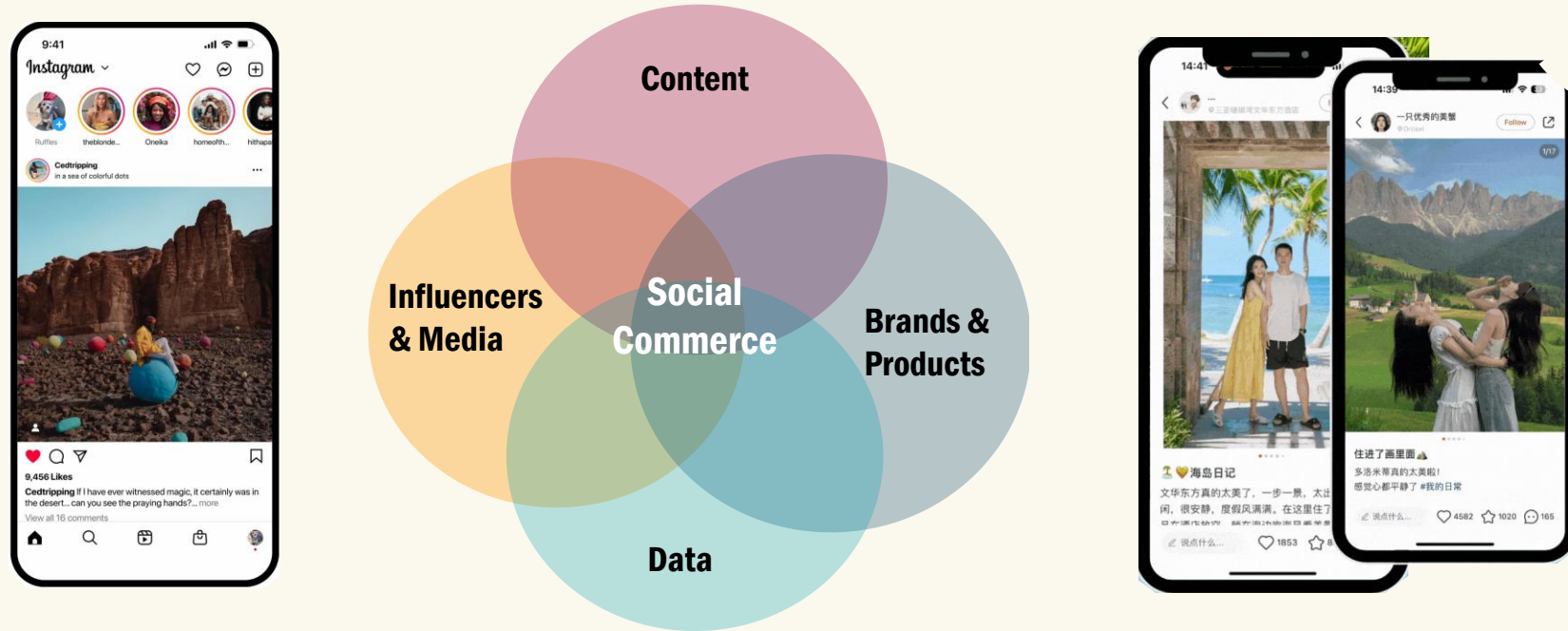
**TECH
DEMOCRATISATION**



**COMPLEXITY
INTENSIFIES**



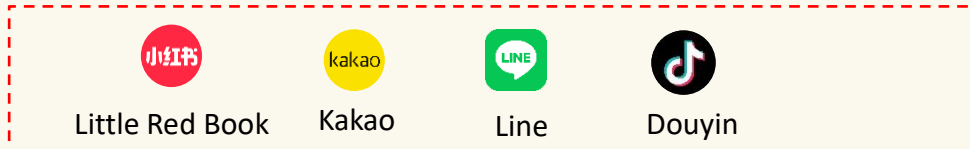
SOCIAL COMMERCE WILL SHIFT TRAVEL TRENDS



Western Market Platforms



Eastern Market Platforms



TECHNOLOGY IS CHANGING EVERYTHING



THE FUTURE OF DISTRIBUTION REPORT

Deloitte

FUTURE OF DISTRIBUTION INSIGHTS REPORT. 2024



Source: Deloitte Insights Report

Deloitte

Personalisation matters more than ever before

Consumers have come to expect personalisation as a standard offering. 71% of consumers expect personalisation from the brands and businesses they choose and 76% get frustrated when they don't have it.¹

Tailored and bespoke
Travel has seen choice increase exponentially from airfares to hotel experiences and proliferation of user-generated content. In the current landscape, the ability to offer diverse options and experiences that cater to individual preferences has become increasingly crucial for attracting and retaining customers. 80% of customers are more likely to purchase from a company that offers personalised experiences.²

Richer experience
Personalisation has become a cornerstone of rich and immersive travel experiences. 63% of consumers indicated offering them targeted promotions is important to them. By leveraging data-driven insights and advanced technologies, travel providers can craft bespoke itineraries that resonate deeply with individual preferences and interests.

Values and taste based
In an era where consumers increasingly seek authenticity and meaningful experiences, personalised travel offerings allow two-hat operators and intermediaries to cater to specific cultural and lifestyle preferences. This enables the creation of itineraries that resonate on a personal level, responding to the travellers' core values. Personalisation transforms travel from a generic commodity into a tailored expression of the traveller's identity and aspirations - especially important as many audiences have important cultural nuances to consider.

- McKinsey, The value of getting personalization right or wrong is multiplying
- Statista, Connecting with meaning: Hyper-personalizing the customer experience using data, analytics, and AI

Importance of personalisation actions for consumers

71%	Make it easy for me to navigate in-store and online
67%	Give me relevant product recommendations
65%	Tailor messaging to my needs
61%	Offer me targeted promotions
59%	Send me timely communications tied to key moments
54%	Personally address communications to me
53%	Engage and onboard me when I buy for the first time

Offer something last for me Show me hidden Meet me where I am

Source: McKinsey, Next in Personalization 2022 consumer survey, n=1,023
 Question: We would like to know how each of these aspects influence your decision to buy from a brand/business for the first time. Numbers above indicate respondents that selected 'important', 'very important' and 'extremely important'.¹

Source: Deloitte Insights Report

Deloitte

FUTURE OF DISTRIBUTION INSIGHTS REPORT. Market Profiles



Source: Deloitte Insights Report

Deloitte

India

The consumer's travel purchase journey, touchpoints and channel dynamics

Multiple points of influence during planning
Consumers in India are using multiple sources to plan travel. Recommendations from friends and relatives are highly influential in shaping travel choices - almost as in rely on recommendations from friends or family when researching and planning trips. While YouTube, Google and Meta are prominent online sources, consumers also consult multiple websites. The accelerating pace of technological innovation in personalised content will amplify the pivotal role of online sources in travel planning. Planning travel to Australia demands significant time and financial investment given its diversity of destinations and varied climate. Eight out of ten travellers plan most details ahead of their trip, including ground transport, places to visit and accommodation.

Preference for using a variety of channels to book
In line with their tendency to consult a range of platforms for travel research and planning, consumers are embracing a multi-channel approach when it comes to booking. Compared to other key source markets, Indian out-of-region travellers consumers are less inclined to book flights directly with airlines - 33% versus 42% book directly. Rather, they are more likely to book various aspects of their trips through online travel marketplaces (e.g. Hotel.com, Booking.com) and travel agents. When travelling to Australia prior to the pandemic, 62% of Indian holiday visitors booked flights with travel agents (the person and online). Post pandemic, Indian travellers are increasingly comfortable booking flights directly with airlines, with this share tripling to 50% in the year ending June 2024. Despite this, travel agents remain an important booking channel, handling 34% of air bookings for Indian holiday visitors to Australia.

Travel research and planning sources

Country	Search engines	YouTube	Travel agents	Travel websites	Friends and family	Relatives
India	42%	38%	28%	22%	18%	15%
USA	35%	25%	15%	30%	10%	5%
UK	30%	20%	10%	25%	15%	10%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. 1. What are the top 7 ways you use to research travel and activities for this trip?

Level of planning

Country	8 weeks or more	4-7 weeks	2-3 weeks	1-2 weeks	Less than 1 week
India	15%	25%	35%	20%	5%
USA	10%	20%	30%	30%	10%
UK	12%	22%	28%	25%	13%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. 2. How far in advance do you plan your trip?

Travel booking methods, all out of region travellers

Country	Travel agents	Online travel marketplaces	Airlines
India	34%	45%	21%
USA	15%	55%	30%
UK	18%	50%	32%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. 3. How do you book your trip?

Booking sources for airfares, visitors to Australia


Country	Travel agents	Online travel marketplaces	Airlines
India	34%	45%	21%
USA	15%	55%	30%
UK	18%	50%	32%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. 4. How do you book your airfare?

Note: Data from the Consumer Demand Project is from consumers who have travelled out of region to the last 12 months, not necessarily to Australia. Data from International Visitor Survey is for all visitors to Australia.

Source: Deloitte Insights Report

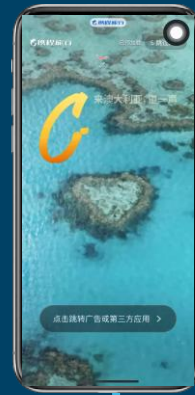
tourism.australia.com/futureofdistribution

TOURISM AUSTRALIA 

SO THAT'S A LOT...

....WHAT ARE WE DOING ABOUT IT?

COME AND SAY G'DAY CONTINUES TO SPEARHEAD OUR WORK



PARTNERSHIPS

HIGH YIELDING TRAVELLERS

CULTURE & EVENTS



NEW YORK,
WE'VE GOT A FEW
BRIGHT LIGHTS
OF OUR OWN.



RUBY'S NEXT ADVENTURE IS COMING SOON...

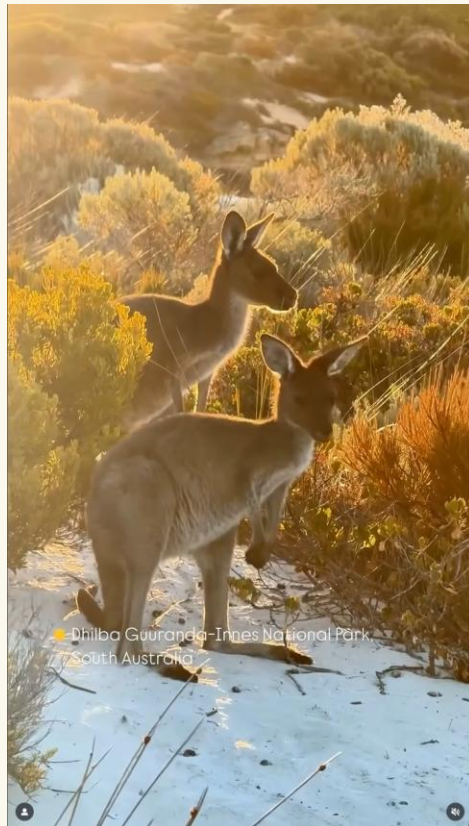


#DestAus25

DESTINATION
AUSTRALIA
SYDNEY 2025



PR & SOCIAL MEDIA



australia • Art Music • Walking Time

australia Golden hour isn't just for perfect lighting - it's also the best time to spot our kangaroos 🦘. Heading out on a wander around dawn or dusk is your best chance to spot many Aussie animals, from cheeky 'roos like these to wallabies, koalas and echidnas 🦨. As well as wildlife, sunset strolls in Dhibla Guaranda-Innes National Park include sweeping views over @yorkpeninsula's breathtaking coastal wilderness 🌊

📍: @intwotheview

📍: Dhibla Guaranda-Innes National Park, @yorkpeninsula, @southaustralia

#SeeAustralia #ComeAndSayGday #SeeSouthAustralia #YorkePeninsula

ID: Text over video reads "This is South Australia's largest mountain range with emus, rock art and vibrant sunsets."

leo_g_paz 🦘🦘🦘🦘🦘
5w 10 likes Reply

mari_tereg 🦘🦘🦘
5w 3 likes Reply

young_kor 🦘🦘🦘
5w 3 likes Reply

tiogara 🦘🦘
5w 3 likes Reply

hakjagrabovica 🦘🦘🦘🦘🦘
5w 6 likes Reply

marylene_julien 🦘🦘
5w 4 likes Reply

igorandrychuk 🦘🦘🦘🦘🦘🦘🦘🦘
5w 3 likes Reply

nicola.diaz.585 🦘🦘🦘
5w 2 likes Reply

cristiancabrera120576 🦘🦘🦘
5w 4 likes Reply

Liked by oceanviewcovillas and 7,366 others
May 6

Add a comment...



SOUTH AUSTRALIA TASTING AUSTRALIA

2 - 11 May 2025

South Australia's most extraordinary producers, chefs, wineries and distillers collide at Tasting Australia, a ten day celebration of curiosity-feeding experiences from 2 - 11 May 2025.

Curated by Karena Armstrong (Salopian Inn) and Kane Pollard (PLACE Dining), the 18th edition promises more than 150 events across Adelaide / Tarntanya and regional South Australia.

Festival highlights include two extraordinary Tasting Australia Airlines adventures - an overnight expedition to the Northern Flinders Ranges and a movement train along the Murray River, as well as a ten-hour rail journey to Adelaide's central Victoria Square lasses led by international talents from a Berg (UK), alongside Australian e Alvarez.

australia's website.



Flinders Ranges, South Australia

australia • Jack Johnson • Update Down

australia The rugged beauty of the Flinders Ranges has been many years in the making. 🦘 Around a five-hour drive from Tarntanya (📍@christianopolis) is South Australia's largest mountain range. 🦘@findsrangesandoutback. Witness this ancient landscape you'll find wildlife, Aboriginal cultural experiences and authentic outback stations. Explore all that's on offer with a stay at @rawnsleypark and enjoy hiking, hot-tubs and 4WD adventures amongst the wilderness 🦘

📍: @chris...

📍: @findsrangesandoutback, @southaustralia

#SeeAustralia #ComeAndSayGday #SeeSouthAustralia #FlindersRanges

ID: Text over video reads "This outback landscape is over 600 million years old" as two people are driving and hiking through a rugged mountain range.

chessa_ Thank you so much for tagging us! 🦘
5w 3 likes Reply

rawnsleypark We're so fortunate to call this our home & it's such an amazing part of our beautiful country, with so many stories to hear, incredible landscapes to see, and spectacular sunsets to be experienced. Thank you so much for including us. 🦘
5w 2 likes Reply

catalinaquent at Flinders is such a stunning area!
5w 4 likes Reply

finds_theoutback The drive through here would be unreal! 🦘
5w 2 likes Reply

rehabilitator_piraxia Beautiful Australia 🦘
5w 1 like Reply

platinagolden 🦘🦘🦘
5w 1 like Reply

4,624 likes
May 6

Add a comment...



australia • Backtop • Titles

australia Welcome to the Flinders Ranges, an outback landscape 600 million years in the making 🦘 In this spectacular slice of @southaustralia, you'll find abundant wildlife, ancient cultures and truly unbelievable sunsets. Base yourself in a luxe eco-villa at @rawnsleyparkstation and explore carving sites, sacred canyons, rock art and wilderness with local Adnyamathantha guides from @adnyam... 🦘

📍: @loopin.aus

📍: @findsrangesandoutback, @southaustralia

#SeeAustralia #ComeAndSayGday #SeeSouthAustralia #FlindersRanges

ID: Text over video reads "This is South Australia's largest mountain range" as a series of videos show two people exploring a mountain range with emus, rock art and vibrant sunsets.

semra_smith We will see you soon 🦘🦘
1d 5 likes Reply

awaywithmaja Definitely one of the most underrated parts of Aus 🦘
1d 11 likes Reply

nastiascreativity Nice 🦘🦘🦘
1d 4 likes Reply

catherinous beautiful views 🦘
1d 6 likes Reply

hakjagrabovica 🦘🦘🦘🦘🦘
1d 4 likes Reply

allanscottsculpture 🦘🦘🦘
17h 1 like Reply

patrymoros 🦘🦘
1d 3 likes Reply

irena_jily.28 🦘
1d 1 like Reply

Liked by mrs_sarahmack and 4,602 others
1 day ago

Add a comment...



I'M IN...
....HOW CAN I GET INVOLVED?

WAYS TO ALIGN WITH WHAT TA IS DOING

CORPORATE WEBSITE



[TOURISM.AUSTRALIA.COM](https://www.tourism.australia.com)

RESEARCH & INSIGHTS



[TOURISM.AUSTRALIA.COM/STATS](https://www.tourism.australia.com/stats)

KEY DISTRIBUTION PARTNERS



[TOURISM.AUSTRALIA.COM/MARKETREGIONS](https://www.tourism.australia.com/marketregions)

PR, FAMILIS & SOCIAL MEDIA



[TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA](https://www.tourism.australia.com/workingwithmedia)

TRADE EVENTS




[TOURISM.AUSTRALIA.COM/EVENTS](https://www.tourism.australia.com/events)

UPDATE ATDW



[ATDW.com.au](https://www.atdw.com.au)

NEWSLETTERS



[TOURISM.AUSTRALIA.COM/SUBSCRIBE](https://www.tourism.australia.com/subscribe)

WORKING WITH TA GUIDE



[TOURISM.AUSTRALIA.COM/WORKINGWITHTA](https://www.tourism.australia.com/workingwithta)

TRADE EVENTS

Including Australian Tourism Exchange
and Marketplace Events

27-29 July 2025:

Australia Marketplace South East Asia, Jakarta

31 July – 2 August 2025:

Australia Marketplace India, Jaipur

15-17 September 2025:

Australia Marketplace North America, LA

10-13 November 2025:

Australia Marketplace China, Xi'an

1-3 December 2025:

Australia Next, Melbourne

10 – 14 May 2026:

Australian Tourism Exchange, Adelaide



[TOURISM.AUSTRALIA.COM/EVENTS](https://www.tourism.australia.com/events)

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Tourism Australia

Thank you *Australia x*

