

# 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

Solid 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

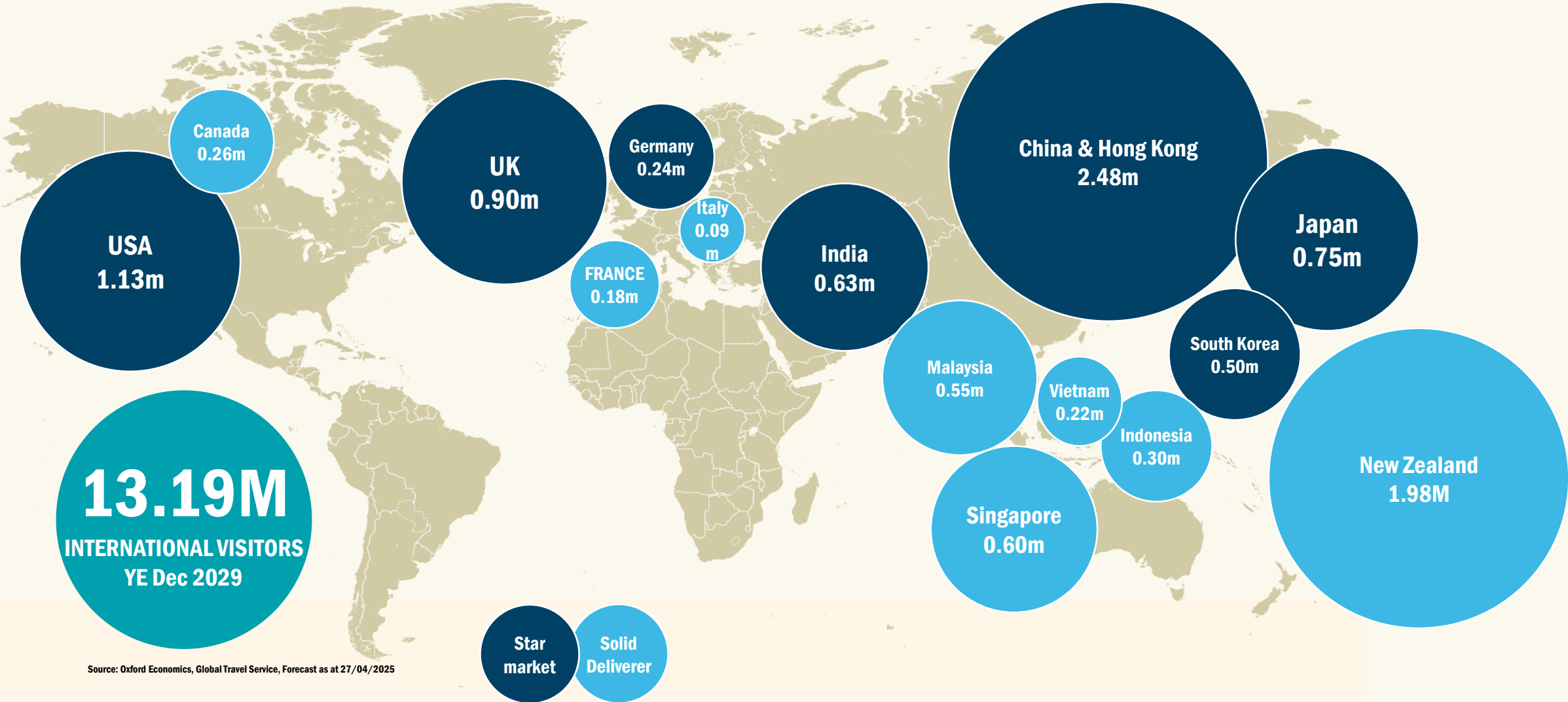
Markets: UK, Ireland, France, South Korea





**PRIORITY MARKETS**

# AUSTRALIA'S VISITATION OUTLOOK TO 2029



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



A couple is seen from the side, sitting in a wicker hot air balloon basket. They are looking out over a vast, rolling landscape of vineyards at sunrise. The sun is low on the horizon, casting a warm, golden glow over the scene. The vineyards are arranged in neat, parallel rows, and a small pond is visible in the middle ground. The sky is filled with soft, wispy clouds. The basket is suspended by ropes, and a portion of the orange balloon is visible in the upper right corner. A blue, stylized graphic element is also present in the upper right corner.

# CURRENT STATE OF PLAY

**We are making good progress – with a lot to celebrate**



A man and a woman are enjoying a sunset in a vineyard. The man is standing on the left, holding a glass of red wine, looking out over the landscape. The woman is sitting on a large rock in the foreground, also holding a glass of red wine. In the background, there are rows of grapevines, a small building, and several kangaroos grazing on the grass. The sun is low on the horizon, creating a warm, golden glow.

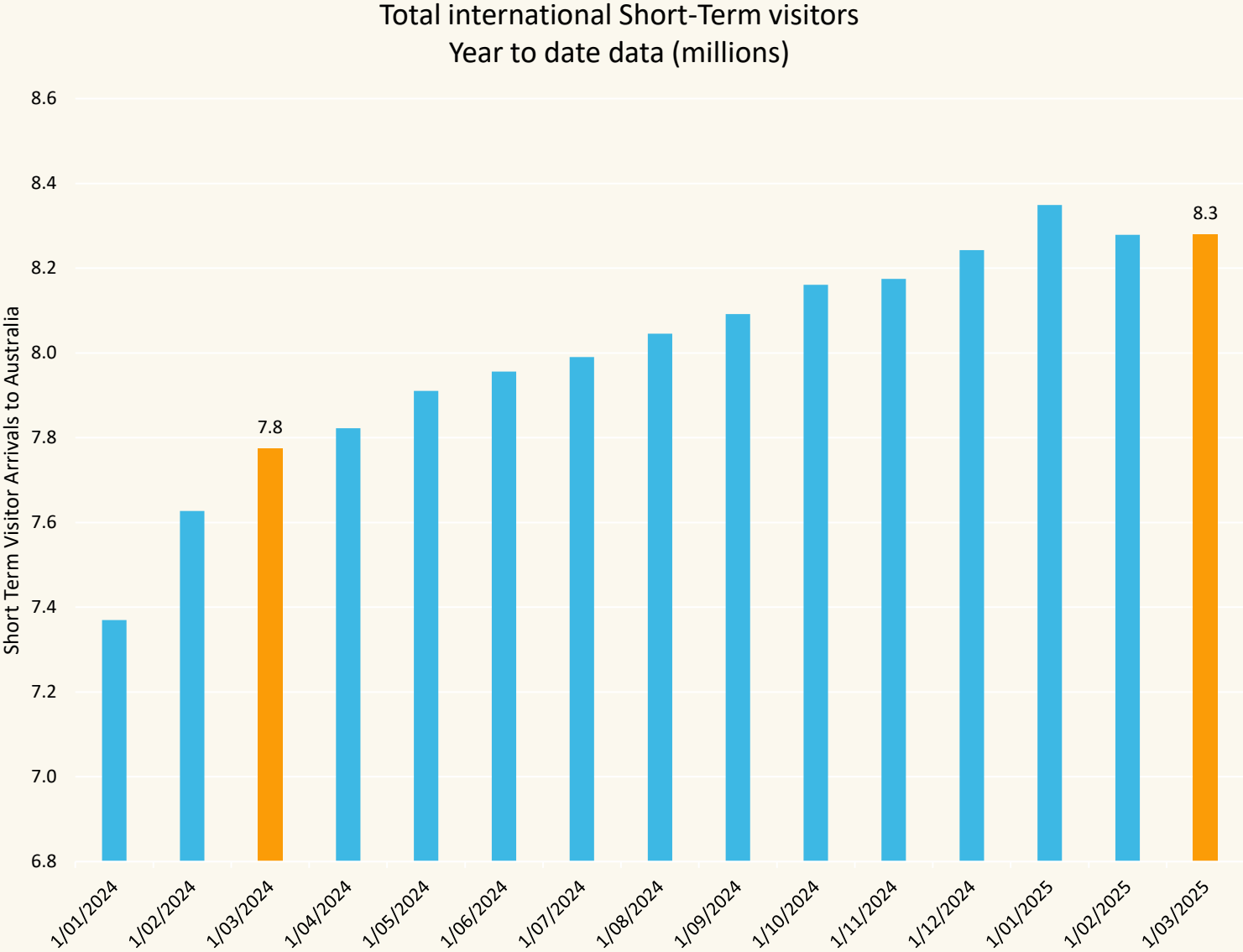
**Total visitor expenditure  
grew to a record**

**\$48.4**  
**billion**

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

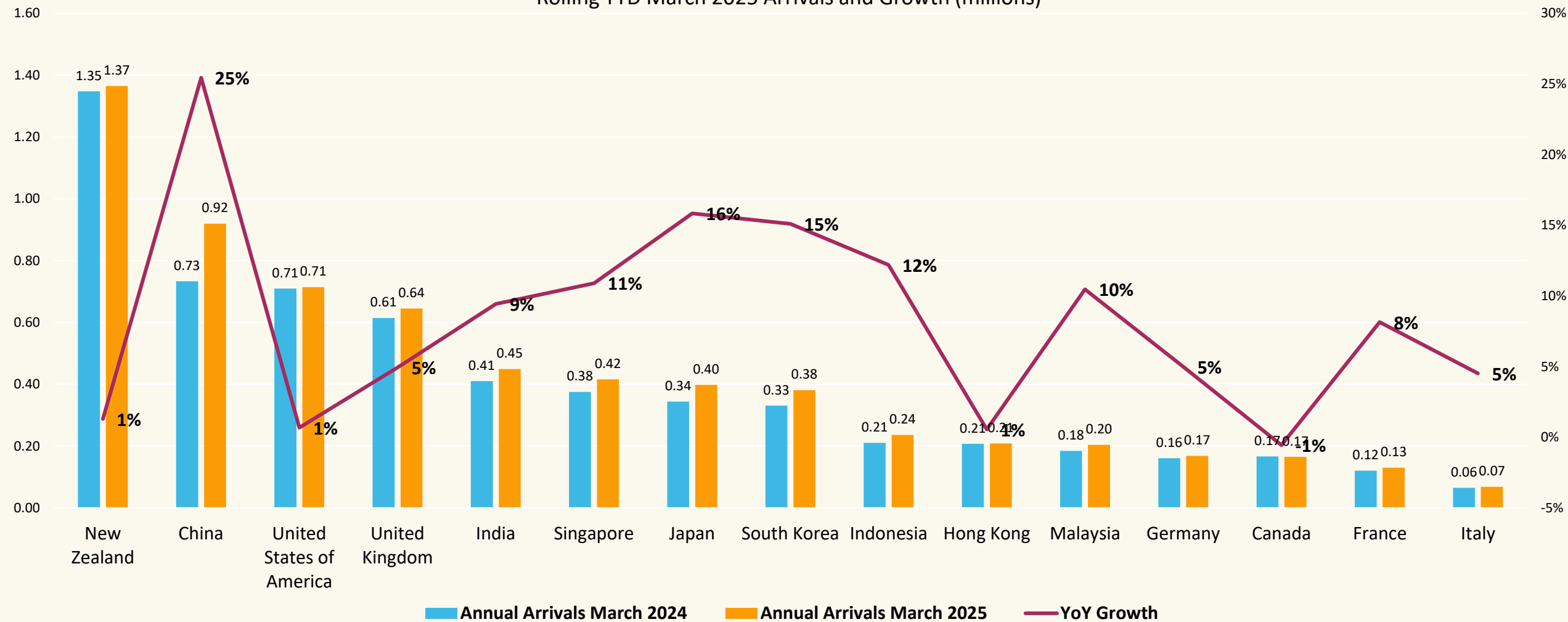


**INTERNATIONAL  
ARRIVALS REACH  
8.3M BY MAR  
2025. 6% GROWTH  
FROM 2024.**



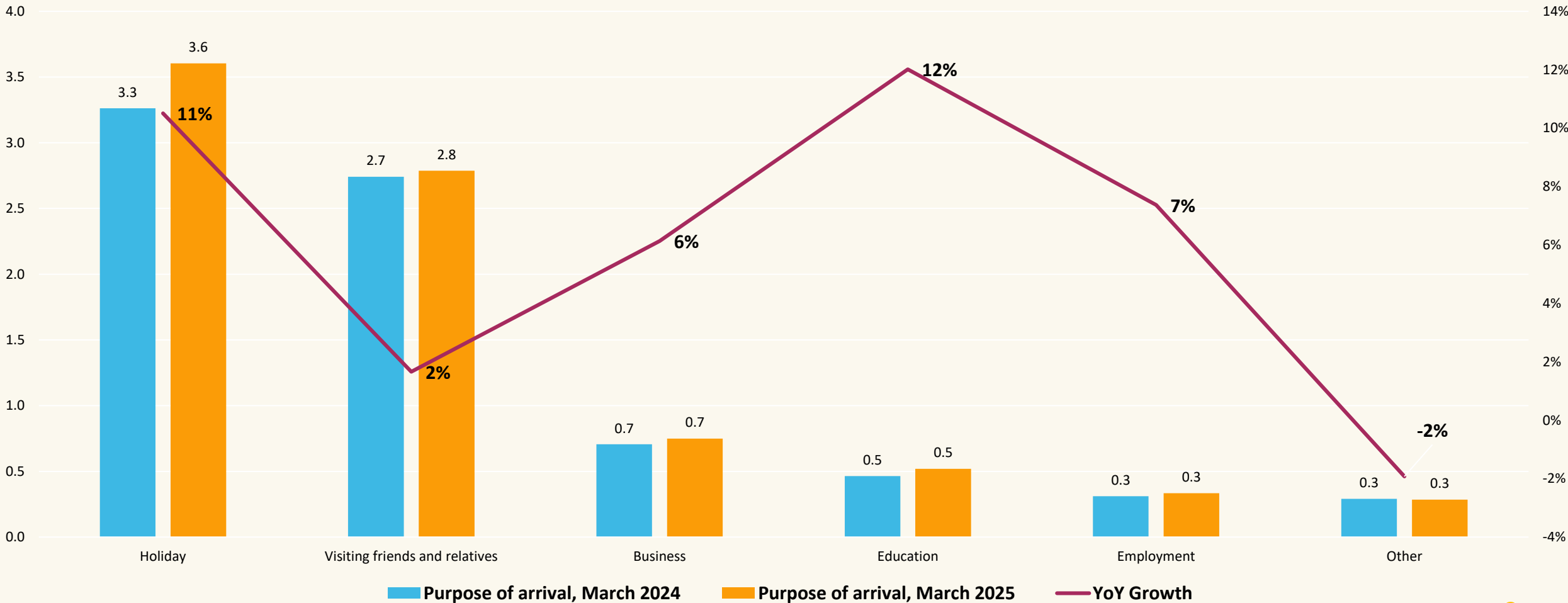
# INTERNATIONAL ARRIVALS BY KEY MARKET

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



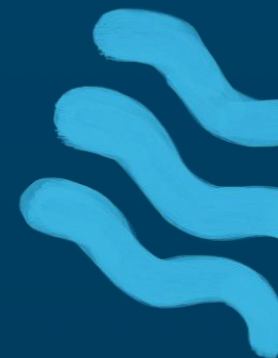
# HOLIDAY MAKERS IN THE LEAD

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



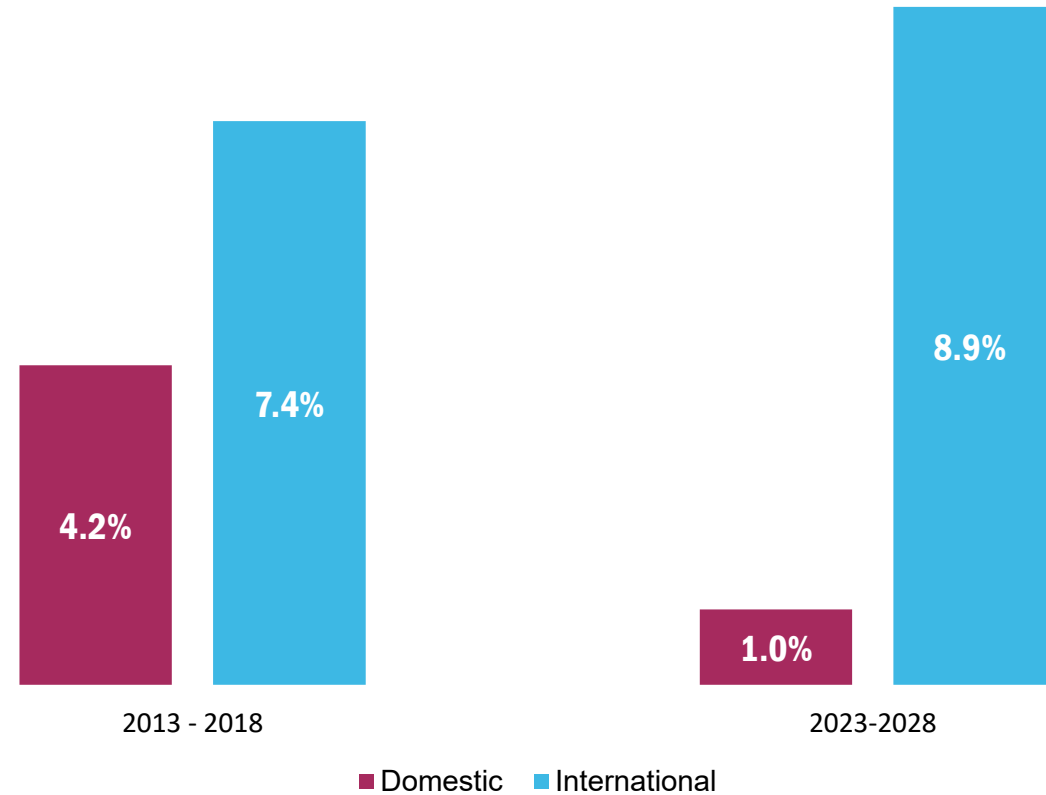


# FUTURE TRENDS



**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

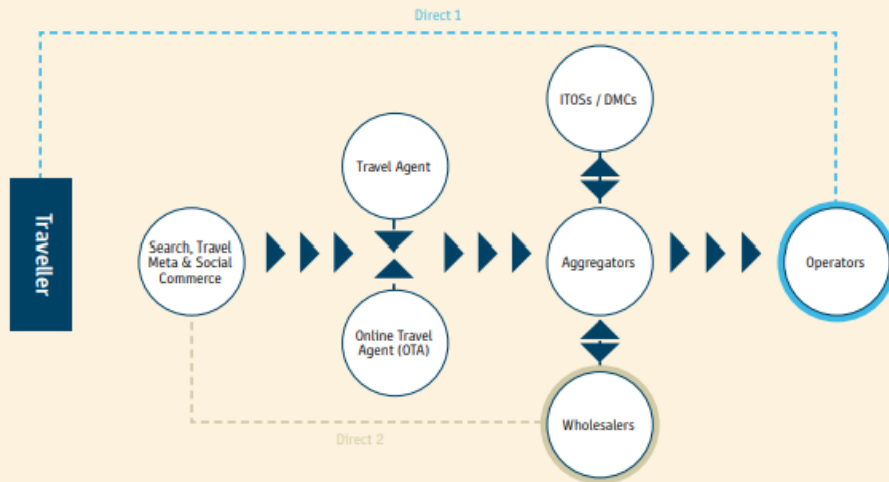
Travellers increasingly mixing and matching how they book, and with who



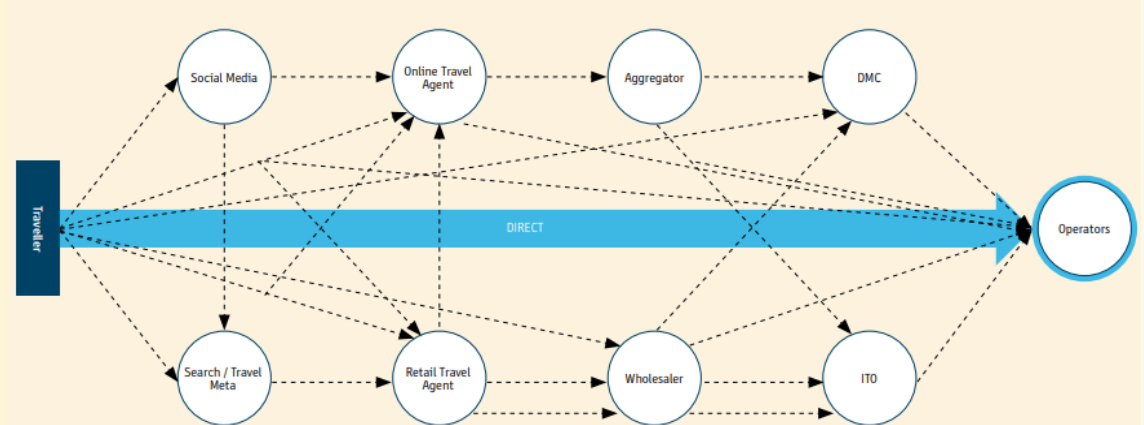
# THE FUTURE OF DISTRIBUTION REPORT

# 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**



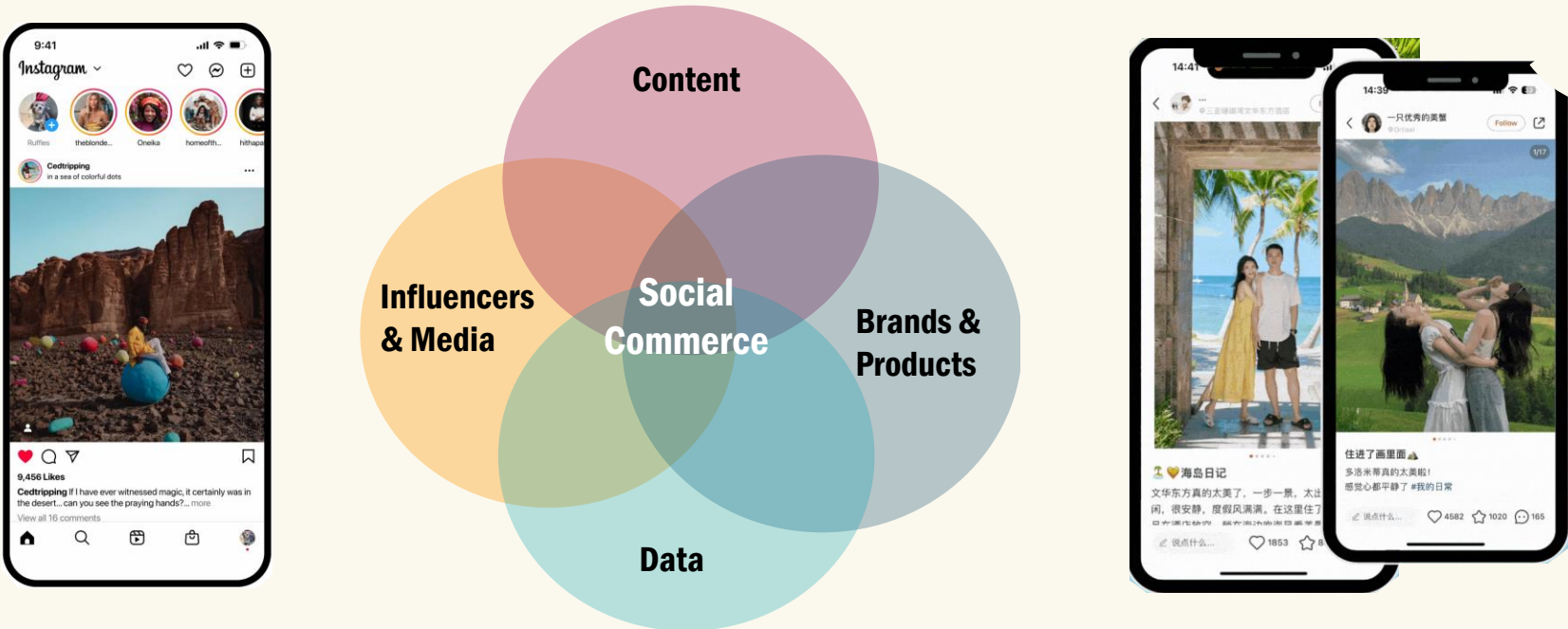
**TECH  
DEMOCRATISATION**



**COMPLEXITY  
INTENSIFIES**



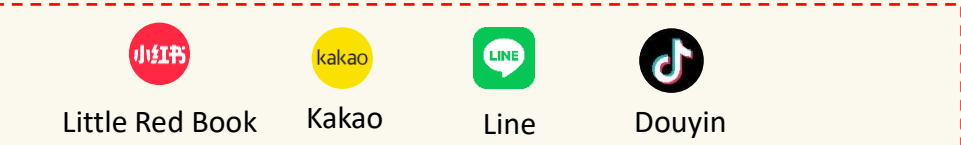
# SOCIAL COMMERCE WILL SHIFT TRAVEL TRENDS



## Western Market Platforms



## Eastern Market Platforms



# TECHNOLOGY IS CHANGING EVERYTHING

## CUSTOMER FACING

### SEARCH



Google



Baidu



Pickyourtrail



GuideGeek



Rome2Rio



Hopper



Hotel Tonight



Airbnb



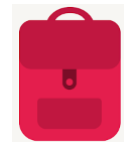
KAYAK



Tripadvisor



TripIt



Travel Spend



iTranslate

### TRIP PLANNING & PERSONALISATION

### PRICE PREDICTION

### BOOKING APPS

### CHATBOT & CONCIERGE

### REVIEWS

### SERVICES

## PRODUCTIVITY

### WEBSITE & DISTRIBUTION



cinelfly



Localize



MarketMuse



Magpie

### CONTENT CREATION & TRANSLATION

### DYNAMIC PRICING



boostAR



Amadeus



Chat 2



TourConnect

### ENQUIRIES

### BOOKINGS MANAGEMENT

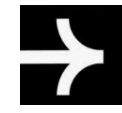


Rezdy



TourRadar

### WORKFORCE EFFICIENCIES



Localis



Deputy

### REVIEWS & BRAND SENTIMENT



Brand24



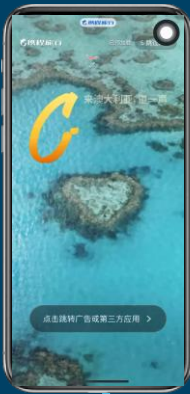
Podium





**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







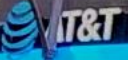
NEW YORK,  
WE'VE GOT A FEW  
BRIGHT LIGHTS  
OF OUR OWN.



AUSTRALIA



3 TIMES SQUARE



ROCK SHOP



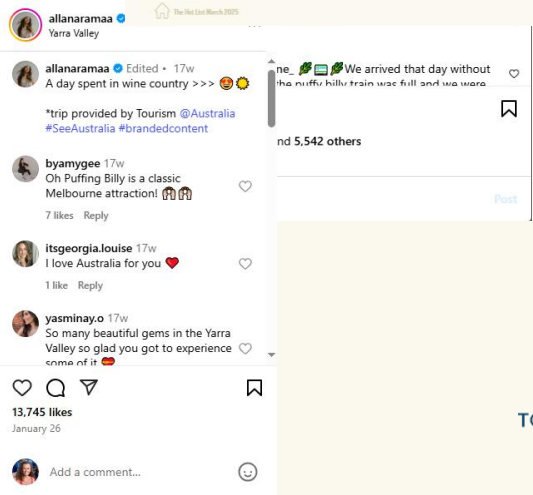
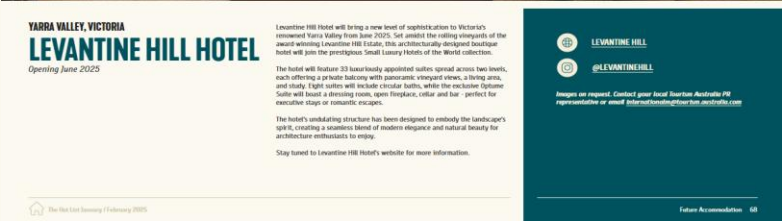
# RUBY'S NEXT ADVENTURE IS COMING SOON...



#DestAus25



# PR & SOCIAL MEDIA



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

# WAYS TO ALIGN WITH WHAT TA IS DOING

**CORPORATE WEBSITE**



**TOURISM.AUSTRALIA.COM**

**RESEARCH & INSIGHTS**



**TOURISM.AUSTRALIA.COM/STATS**

**KEY DISTRIBUTION PARTNERS**




**TOURISM.AUSTRALIA.COM/MARKETREGIONS**

**PR, FAMILS & SOCIAL MEDIA**



**TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA**

**TRADE EVENTS**



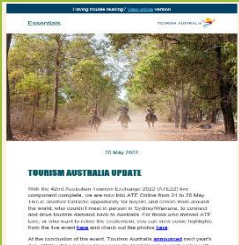
**TOURISM.AUSTRALIA.COM/EVENTS**

**UPDATE ATDW**



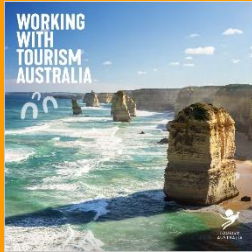
**ATDW.com.au**

**NEWSLETTERS**



**TOURISM.AUSTRALIA.COM/SUBSCRIBE**

**WORKING WITH TA GUIDE**



**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, Location TBC

**1-3 December 2025:**

Australia Next, Melbourne

**10 – 14 May 2026:**

Australian Tourism Exchange, Adelaide



**TOURISM.AUSTRALIA.COM/EVENTS**

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**Kristy Malapa**

Industry Relations Manager

[kmalapa@tourism.australia.com](mailto:kmalapa@tourism.australia.com)

+61 404 054 543





Thank you  
*Australia x*

