

# 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

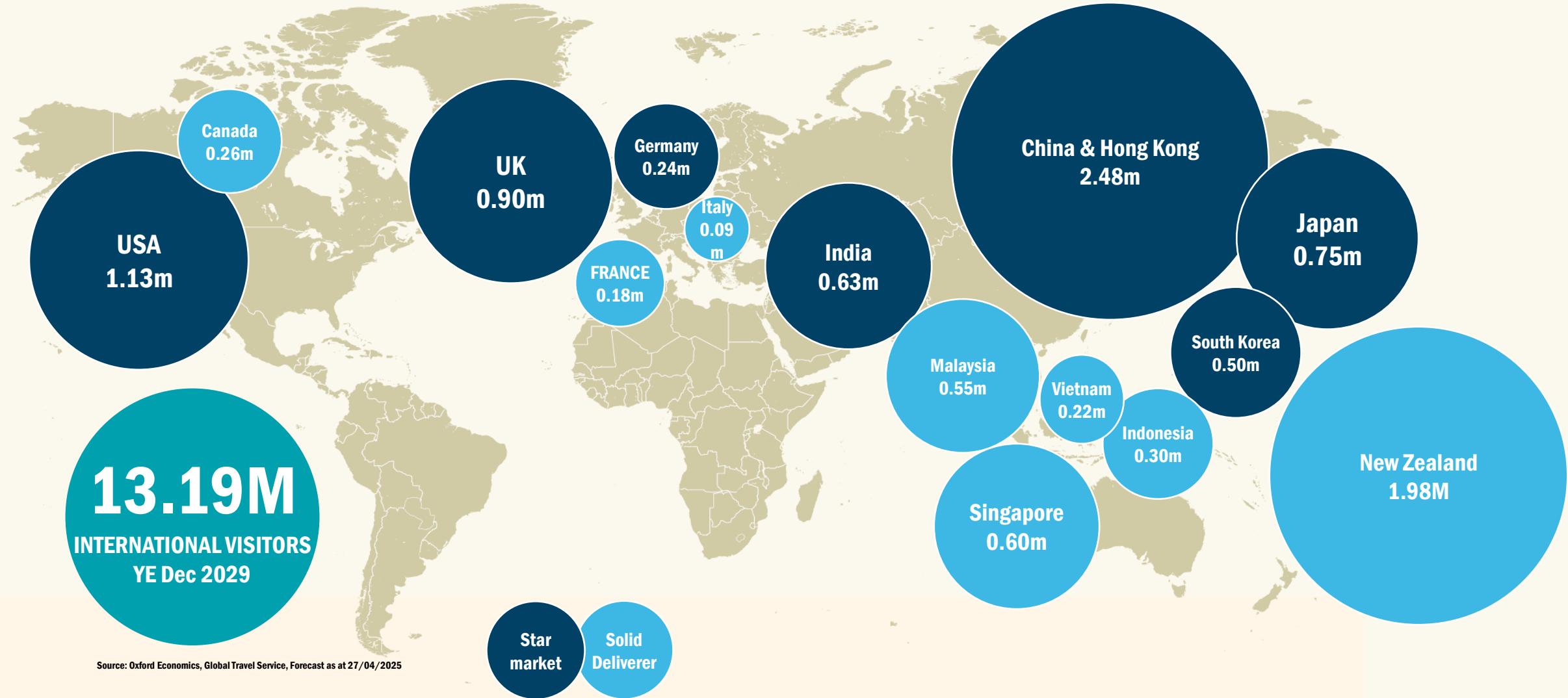


# TOURISM AUSTRALIA'S FY26 STRATEGIC PRIORITIES





# AUSTRALIA'S VISITATION OUTLOOK TO 2029





# CURRENT STATE OF PLAY

We are making good progress – with a lot to celebrate



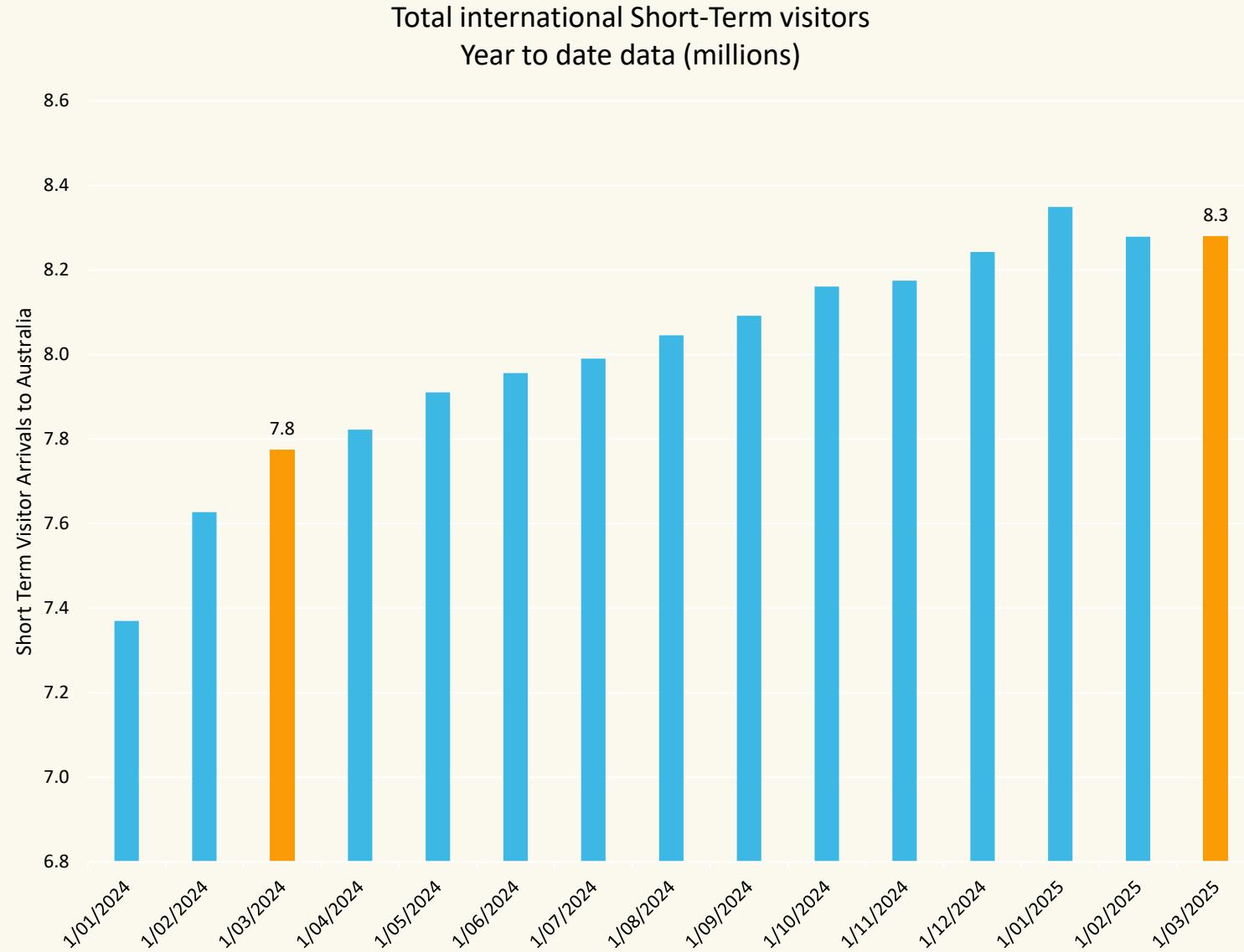
2025

**Total visitor expenditure  
grew to a record**

**\$48.4  
billion**

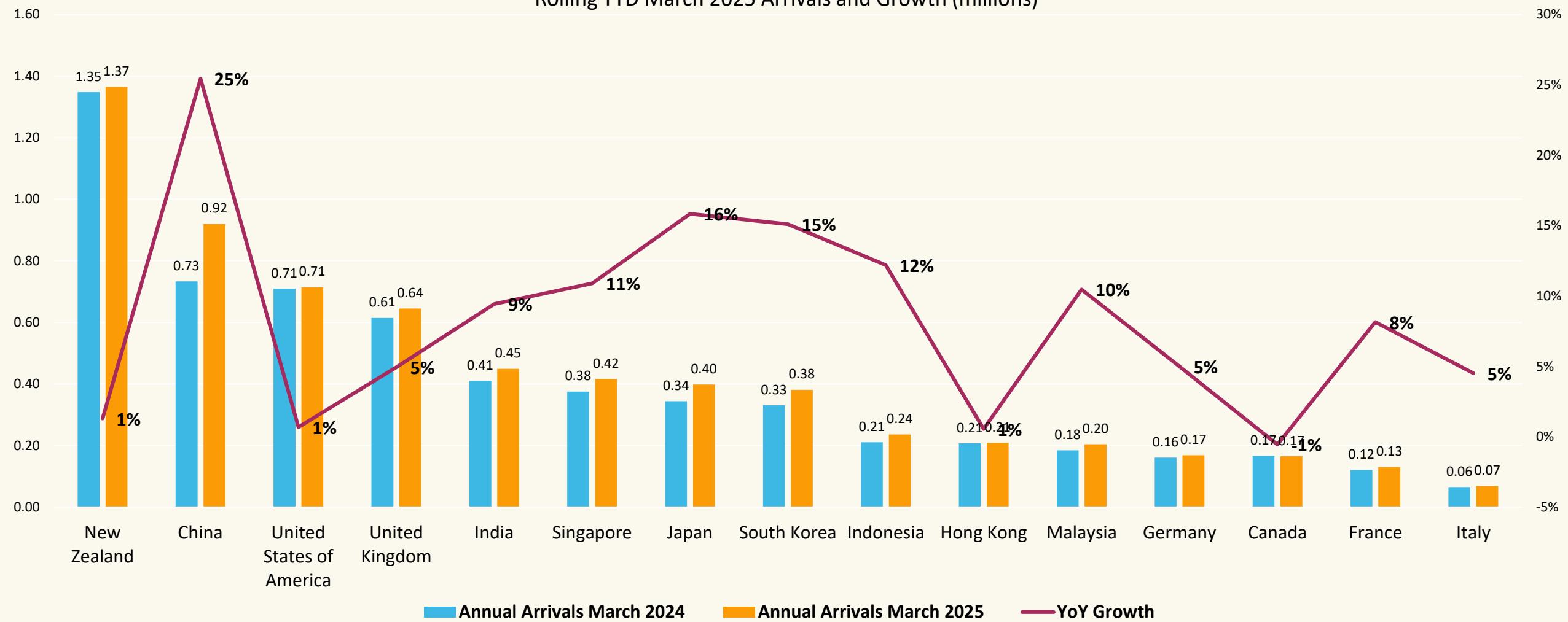
Data source: Tourism Research Australia, International Visitors Survey, September 2024.

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



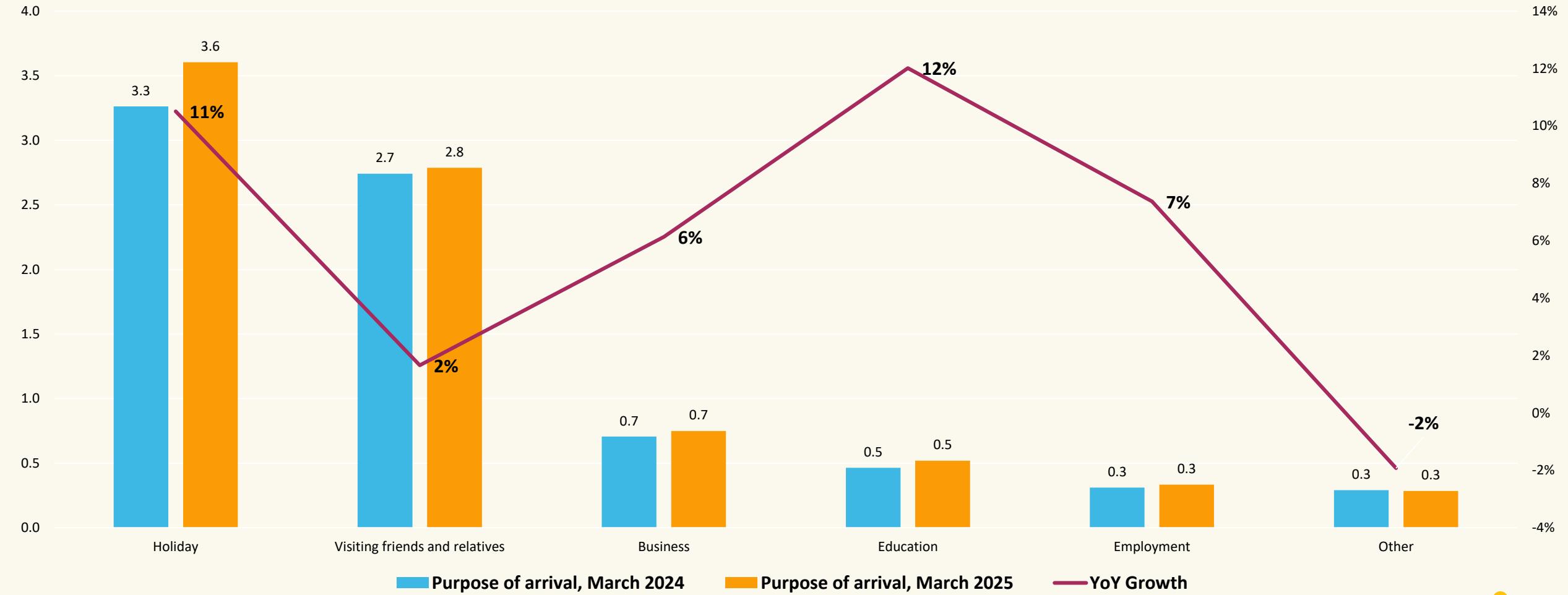
# INTERNATIONAL ARRIVALS BY KEY MARKET

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

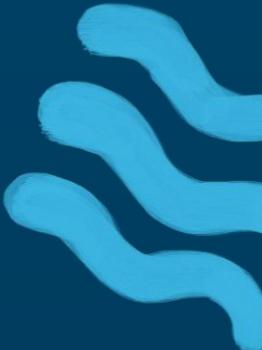


# HOLIDAY MAKERS IN THE LEAD

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



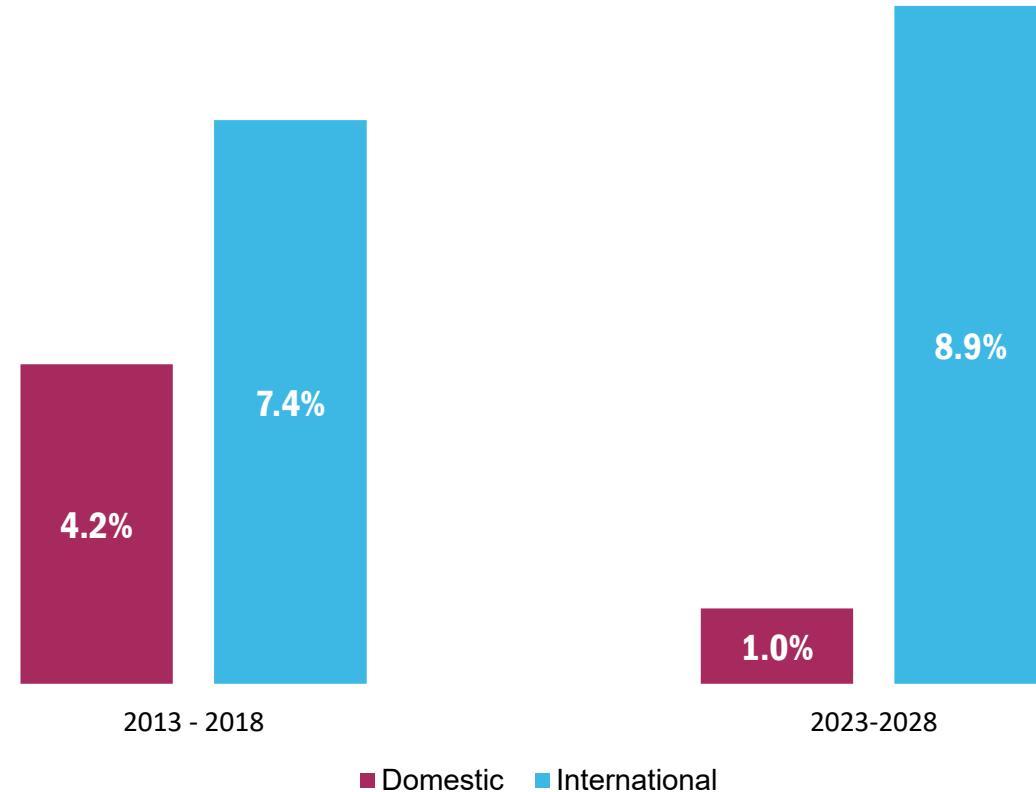
# FUTURE TRENDS



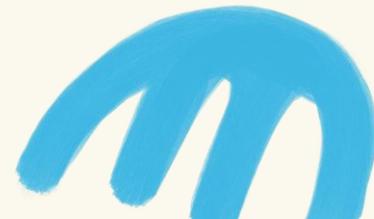
**WHILST DOMESTIC  
WILL CONTINUE TO  
ACCOUNT FOR THE  
BULK OF VISITORS,  
THE PACE OF GROWTH  
FOR INTERNATIONAL  
IS EXPECTED TO BE  
HIGHER**

#### 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

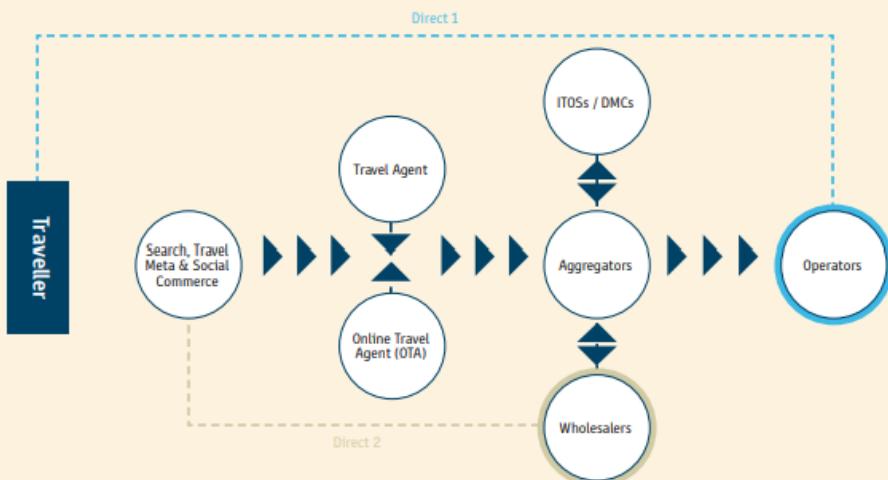
Travellers increasingly mixing and matching how they book, and with who



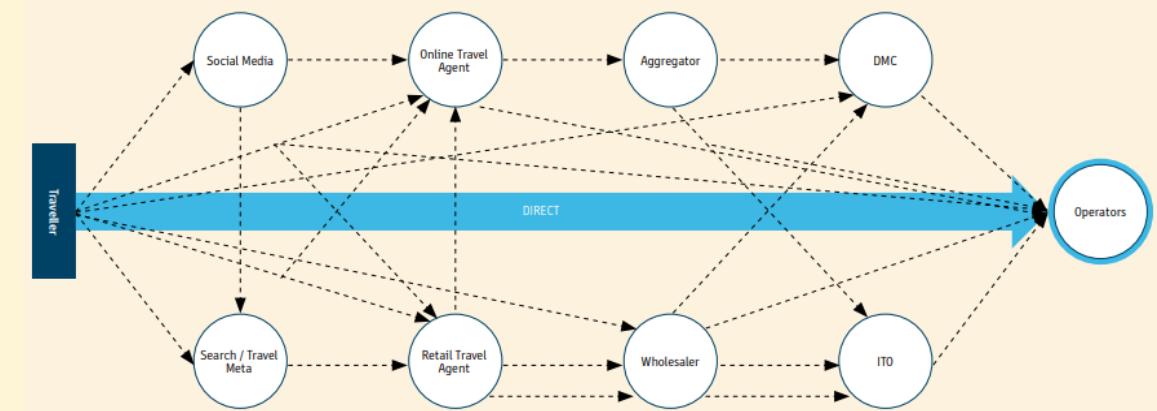
# THE FUTURE OF DISTRIBUTION REPORT

# 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



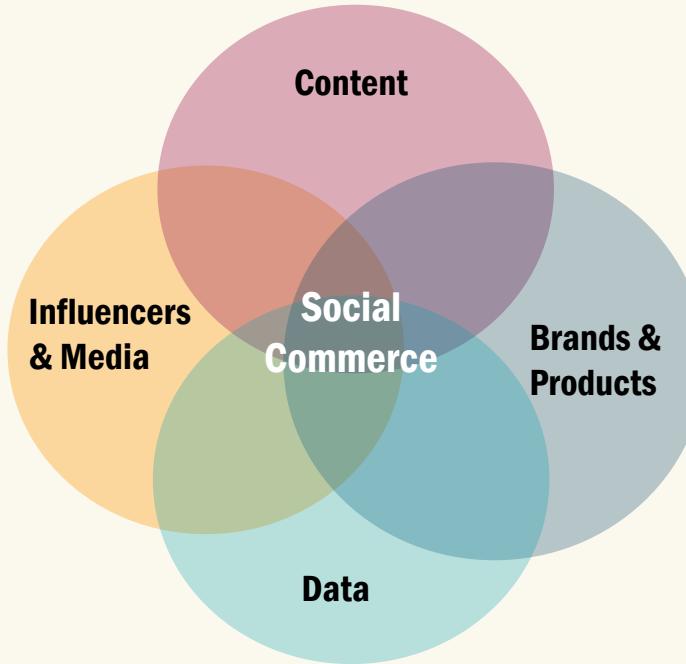
TECH  
DEMOCRATISATION



COMPLEXITY  
INTENSIFIES



# SOCIAL COMMERCE WILL SHIFT TRAVEL TRENDS



## Western Market Platforms



Instagram



Facebook



Pinterest



TikTok

## Eastern Market Platforms



Little Red Book



Kakao



Line



Douyin

# TECHNOLOGY IS CHANGING EVERYTHING

CUSTOMER FACING	SEARCH	TRIP PLANNING & PERSONALISATION	PRICE PREDICTION	BOOKING APPS	CHATBOT & CONCIERGE	REVIEWS	SERVICES							
	Google	Baidu	Pickyourtrail	GuideGeek	Rome2Rio	Hopper	Hotel Tonight	Airbnb	KAYAK	Tripadvisor	Tripli	Travel Spend	iTranslate	
														
PRODUCTIVITY	WEBSITE & DISTRIBUTION	CONTENT CREATION & TRANSLATION	DYNAMIC PRICING	ENQUIRIES	BOOKINGS MANAGEMENT	WORKFORCE EFFICIENCIES	REVIEWS & BRAND SENTIMENT							
														

# THE FUTURE OF DISTRIBUTION REPORT

Deloitte

TOURISM AUSTRALIA

# FUTURE OF DISTRIBUTION INSIGHTS REPORT.

2024

An aerial photograph of the Great Barrier Reef, showcasing the complex and winding structures of the coral formations against the clear, turquoise waters of the Coral Sea. The image captures the natural beauty and scale of this world-renowned marine ecosystem.

Future of Distribution Insights Report

Deloitte

TOURISM AUSTRALIA

## 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.<sup>1</sup>

### Tailored and bespoke

Travel has seen choice increase exponentially from airfares to hotel experiences and proliferation of accessible content.

In the travel landscape, the ability to offer diverse options and experiences that cater to individual preferences has become increasingly crucial for brands to retain and retain customers. 80% of customers are more likely to purchase from a company that offers personalised experiences.<sup>2</sup>

### Richer experience

Personalisation has become a cornerstone of rich and immersive travel experiences. 65% of consumers make travel decisions based on promotional offers important to them. By leveraging data-driven insights and advanced technologies, travel providers can offer consumers 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 offers consumers operators and intermediaries to cater to specific cultural and lifestyle preferences. This enables the consumer's personal values to resonate on a personal level, responding to the travellers' core values. Personalisation transforms travel from a generic consumer experience to an expression of the traveller's identity and aspirations – especially important as many audiences have important cultural nuances to consider.

<sup>1</sup> McKinsey, The value of getting personalisation right or wrong is multiplying  
<sup>2</sup> Deloitte, Connecting with meaning: Hyper-personalising the customer experience using data, analytics, and AI

### Importance of personalisation actions for consumers

Action	Importance (%)
Make it easy for me to navigate in-store and online	70%
Give me relevant product recommendations	67%
Tailor messaging to my needs	66%
Offer me targeted promotions	65%
Send me timely communications tied to key moments	59%
Personally address communications to me	54%
Engage and interact with me when I blog for the first time	53%

**Other something just for me**   **Breaking barriers**   **Meet me where I am**

Source: McKinsey, Next in Personalisation 2021 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 shown indicate respondent that selected 'important', 'very important', and 'extremely important'. 1

Source: Deloitte Insights Report

10

Definitive

TOMORROW'S  
ADVISOR

# FUTURE OF DISTRIBUTION INSIGHTS REPORT.

## Market Profiles

An aerial photograph of a white speedboat moving diagonally across the frame from the bottom left towards the top right. The boat is creating a prominent white wake and spray. The water is a vibrant turquoise color, with darker, shadowed areas of coral reefs visible beneath the surface. The overall scene is bright and suggests a tropical, sunny environment.

Future of Distribution Market Profiles

**Debitte** TOURISM AUSTRALIA

## 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 six in ten rely on recommendations from friends or family when researching and planning trips.

While YouTube, Google and Meta are prominent online sources, consumers also canvass multiple websites. The accelerating pace of travel planning in person and online will amplify the pivotal role of online websites 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, place 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 are more likely to book travel through a travel agent with airline – 35% versus 42% book directly. Rather, they are more likely to book various aspects of their trips through online travel platforms (e.g. Kayak, Bookaway) and travel agencies.

Online travel platforms are the most popular channel for 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 increasing 50% to 55% between 2018 and 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**

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024  
Q: What sources do you use to research ideas and inspiration for the trip?

**Level of planning**

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024  
Q: Who planned what travel components? (Source: Tourism Australia's Consumer Demand Project, Jan to Mar 2024)

**Travel booking methods, all out of region travellers**

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024  
Q: What travel booking methods did you use to book the different aspects of your trip?

**Booking sources for airfares, visitors to Australia**

Source: Tourism Research Australia, International Visitor Survey, Jan 2024  
Q: Who do you have booked your flight?

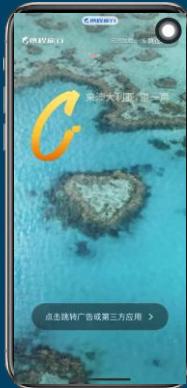
Note: Data from the Consumer Demand Project is for those consumers who have travelled out of region in the last 12 months, not necessarily to Australia. Data from International Visitor Survey is visitors to Australia.

**[tourism.australia.com/futureofdistribution](http://tourism.australia.com/futureofdistribution)**

**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





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



#DestAus25

DESTINATION  
AUSTRALIA  
SYDNEY 2025



# PR & SOCIAL MEDIA



**YARRA VALLEY, VICTORIA**  
**LEVANTINE HILL HOTEL**  
*Opening June 2025*

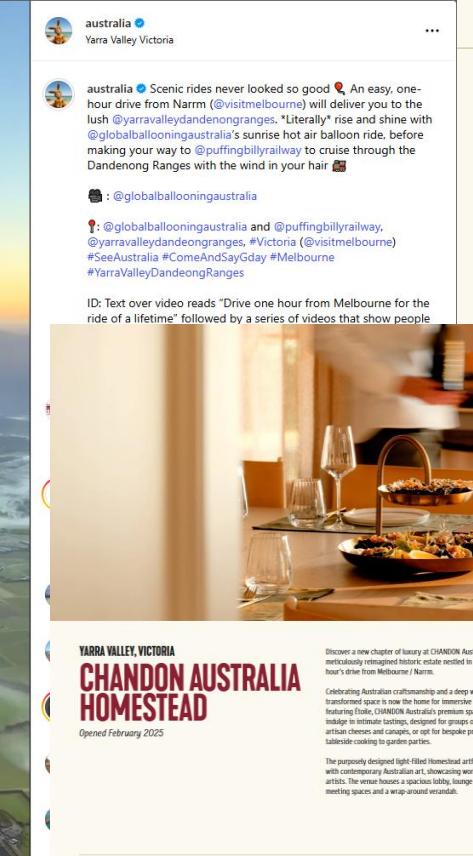
Leesline Hill Hotel will be a new level of sophistication to Victoria's renowned Yarra Valley from June 2005. Set amidst the rolling vineyards of the award-winning Leesline Hill Estate, this architecturally designed boutique hotel will join the prestigious Small Luxury Hotels of the World collection. The hotel will feature 33 luxuriously appointed suites spread across two levels, each offering a private balcony with panoramic vineyard views, a living area, and study. Eight suites will include circular beds, while the exclusive Optune Suite will feature a large sunken tub, open fireplace, ceiling bar and perfect for executive stays or romantic escapes.

The hotel's undulating structure has been designed to embody the landscape's spirit, creating a seamless blend of modern elegance and natural beauty for architecture enthusiasts to enjoy.



Drive one hour from Melbourne  
for the ride of a lifetime

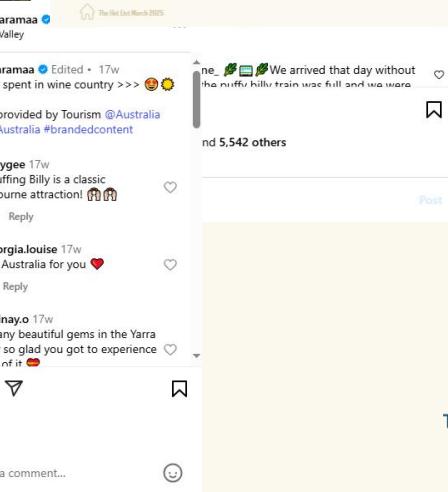
## Yarra Valley and Dandenong Ranges Victoria



YARRA VALLEY, VICTORIA  
**CHANDON AUSTRALIA  
HOMESTEAD**

Discover a new chapter of luxury at CHANDON Australia's Homestead, a meticulously reimagined historic estate nestled in the Yarra Valley - just one hour's drive from Melbourne / Narre Warren.

Celebrating Australian craftsmanship and a deep winemaking legacy, this transformed space is now the home for immersive tasting experiences featuring **CHANDON** Australia's premium sparkling wine. Guests can indulge in intimate tastings, designed for groups of up to ten, paired with local artisan cheeses and canapés, or opt for bespoke private events ranging from tableside cooking to garden parties.



TOURISM AUSTRALIA

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



# WAYS TO ALIGN WITH WHAT TA IS DOING

## CORPORATE WEBSITE



[TOURISM.AUSTRALIA.COM](http://TOURISM.AUSTRALIA.COM)

## RESEARCH & INSIGHTS



[TOURISM.AUSTRALIA.COM/STATS](http://TOURISM.AUSTRALIA.COM/STATS)

## KEY DISTRIBUTION PARTNERS



[TOURISM.AUSTRALIA.COM/MARKETREGIONS](http://TOURISM.AUSTRALIA.COM/MARKETREGIONS)

## PR, FAMILS & SOCIAL MEDIA



[TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA](http://TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA)

## TRADE EVENTS



[TOURISM.AUSTRALIA.COM/EVENTS](http://TOURISM.AUSTRALIA.COM/EVENTS)

## UPDATE ATDW



[ATDW.com.au](http://ATDW.com.au)

## NEWSLETTERS



[TOURISM.AUSTRALIA.COM/SUBSCRIBE](http://TOURISM.AUSTRALIA.COM/SUBSCRIBE)

## WORKING WITH TA GUIDE



[TOURISM.AUSTRALIA.COM/WORKINGWITHTA](http://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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Thank you  
Australia ✨

