

Emerging Tourism Trends

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EGM Industry
Tourism Australia



Our purpose:

Grow demand
enabling a
competitive and
sustainable
Australian tourism
industry

Three core functions:

Create Demand

Marketing to make Australia the most desirable destination on earth

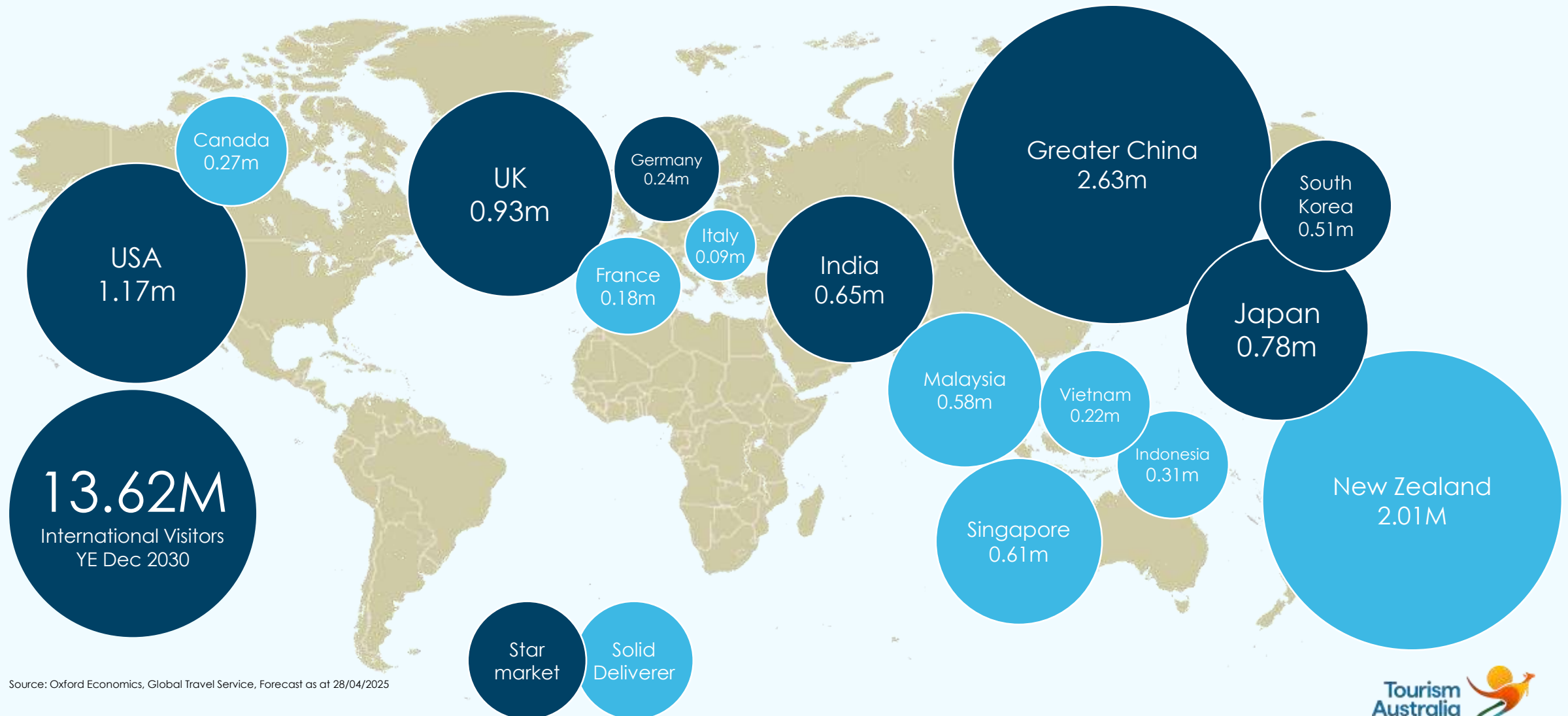
Convert Demand

Work with industry and partners converting demand into expenditure

Support Industry

Provide leadership, insight, and advocacy to help the Australian tourism industry thrive

TA's core markets and projected visitation by 2030



Source: Oxford Economics, Global Travel Service, Forecast as at 28/04/2025

Total international
visitor trip expenditure
has grown to a record

\$52.6
billion

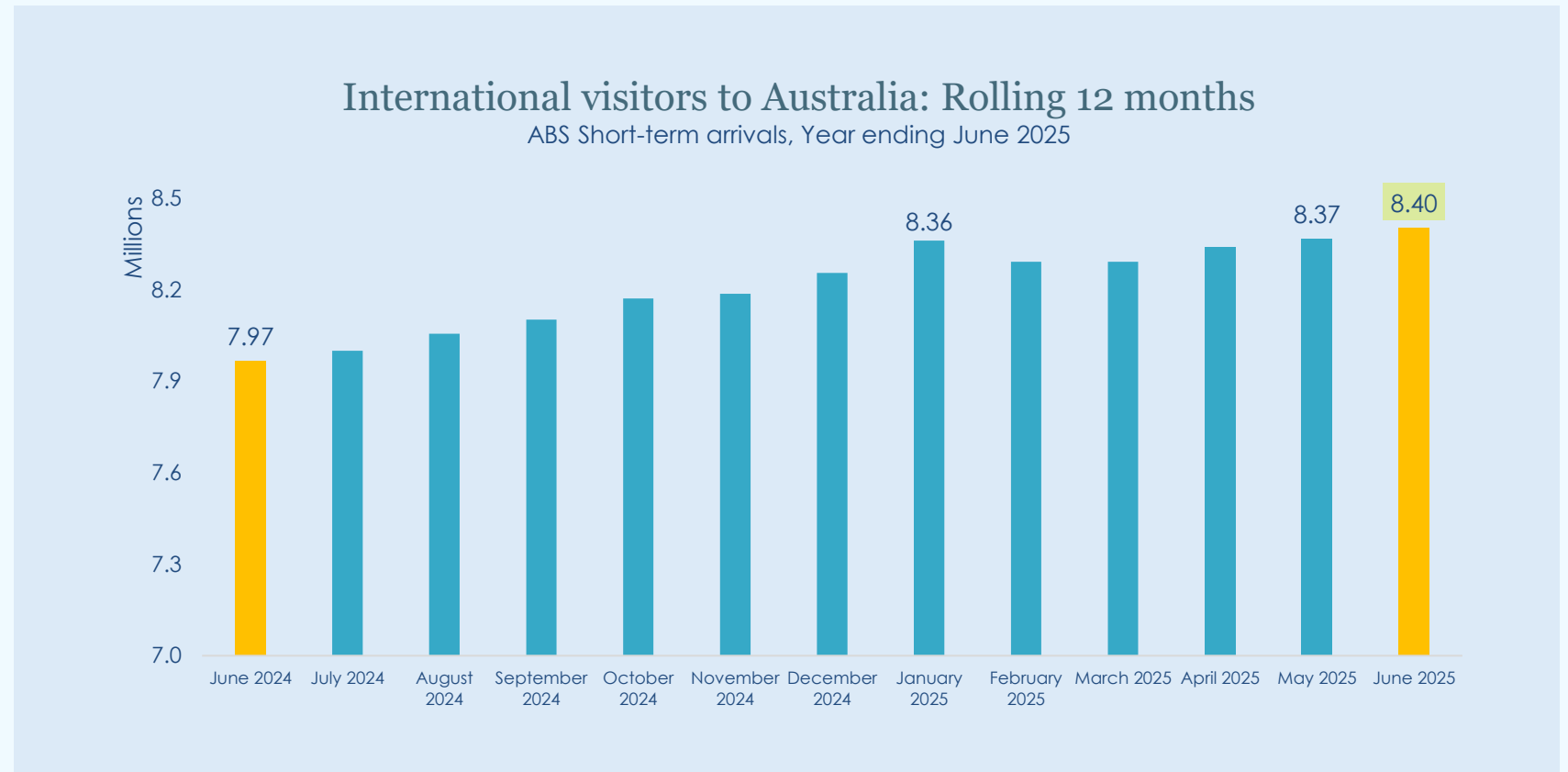
- Right direction
- Some parts of the industry are doing better than others
- Macro pressures remain in many markets

Source: Tourism Research Australia, International Visitor Survey, Year Ending March 2025

International visitation continues to trend in the right direction

8.4

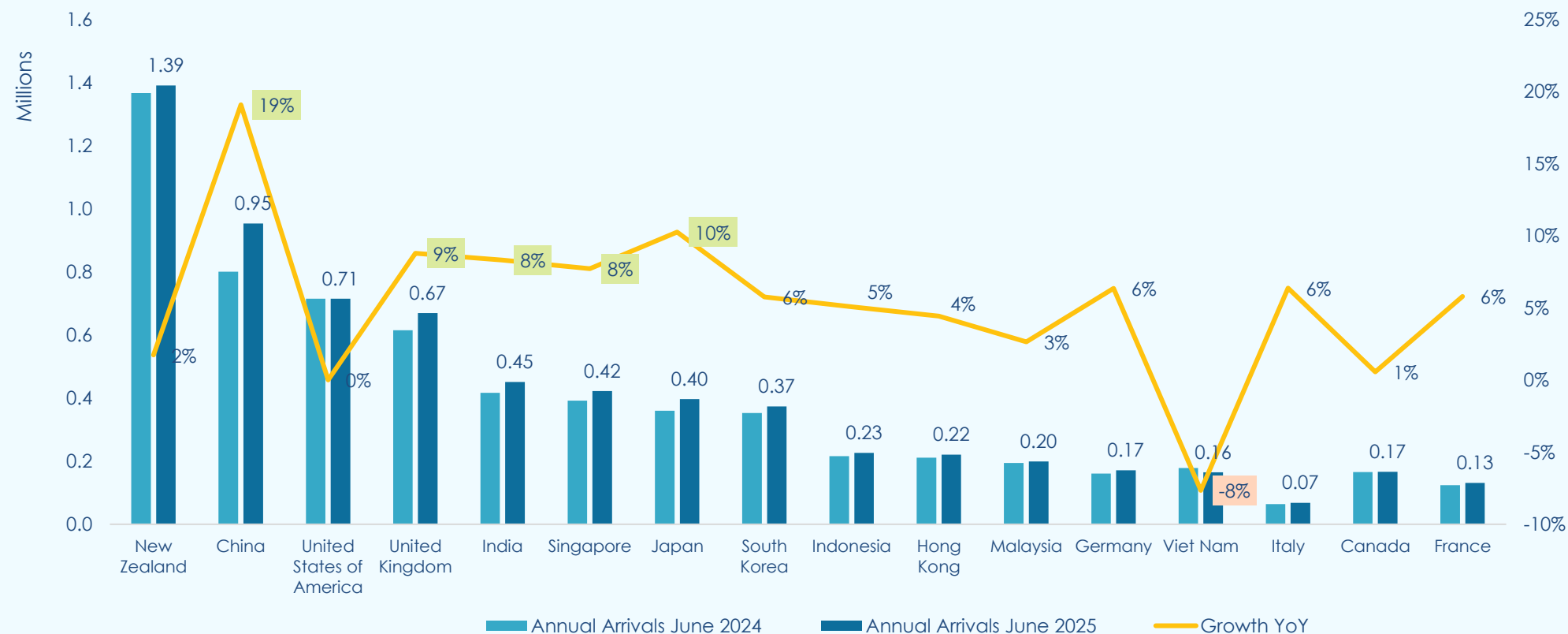
million visitors
in past year – and the
numbers are growing



Total arrivals market

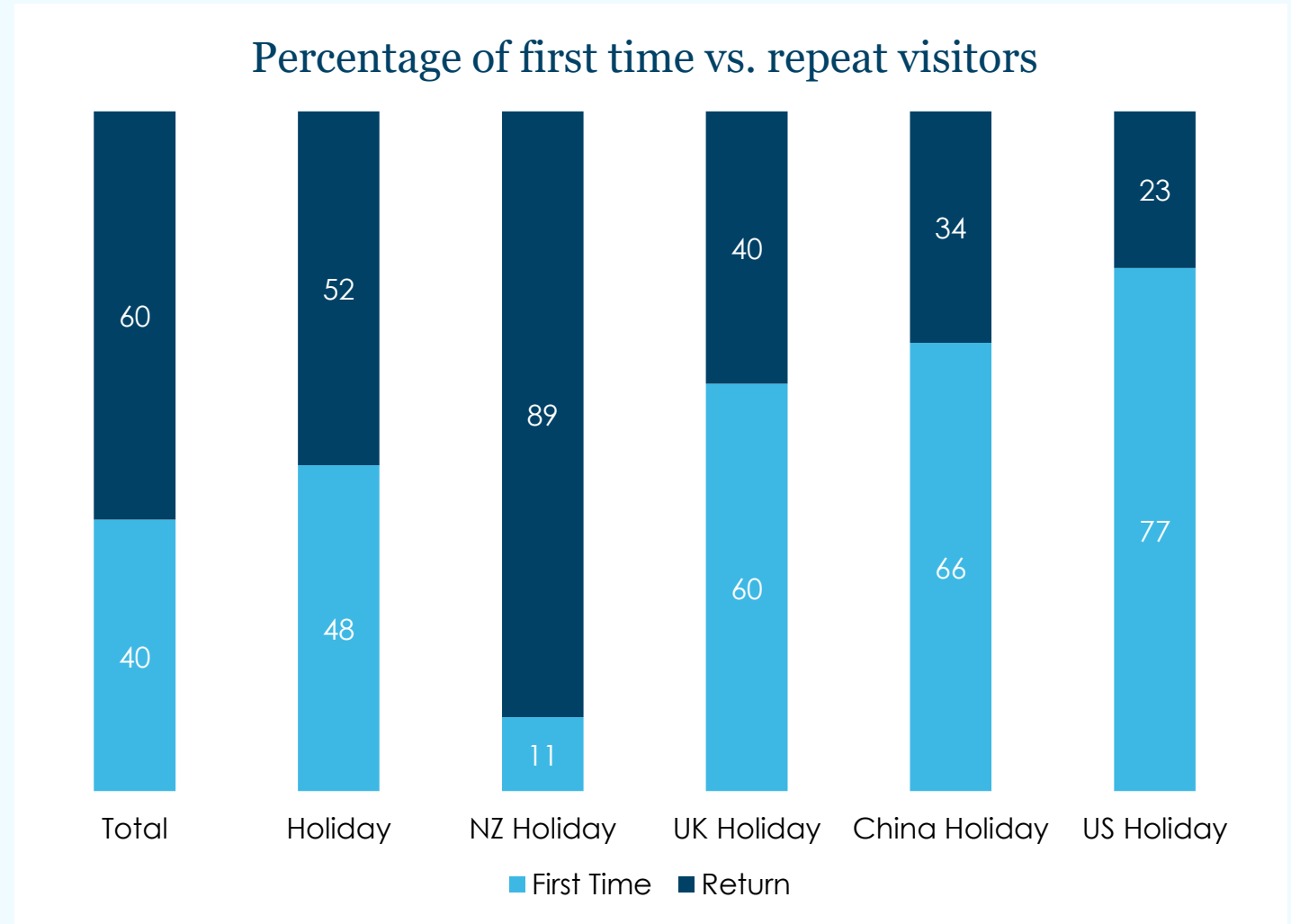
Total short-term arrivals by TA market

ABS, YE June 2025 vs. YE June 2024, Arrivals and Growth



People who visit Australia have a high propensity to come back

NB: First time visitation to Australia is up on 2019 in 2025



Source: Tourism Research Australia, International Visitors Survey, YE March 2025

Visitor arrivals to Australia on path to steady growth



Some emerging trends

Six macro trends impacting Australia to 2035



Run to yield: Overtourism is forcing destinations to think differently



Croatia

Prohibiting new short stay accommodation



Austria

Erected wooden fences to obstruct view of Hallstatt (Frozen)



Greece

20k per day limit on visitors to the Acropolis



Japan

Introduced fees and visitor caps for Mount Fuji

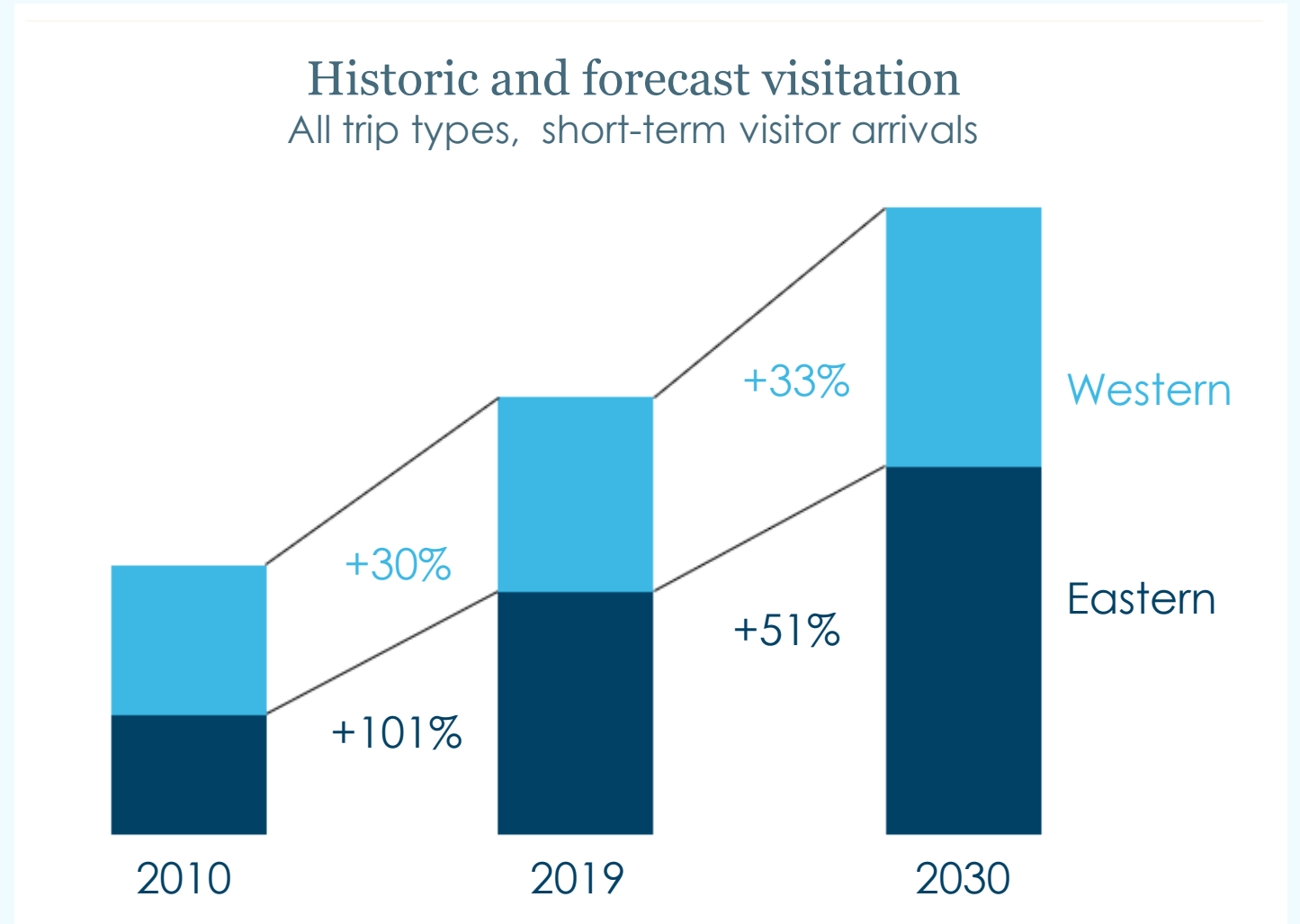


Spain

Ban on short term rentals from 2028

Asian Century

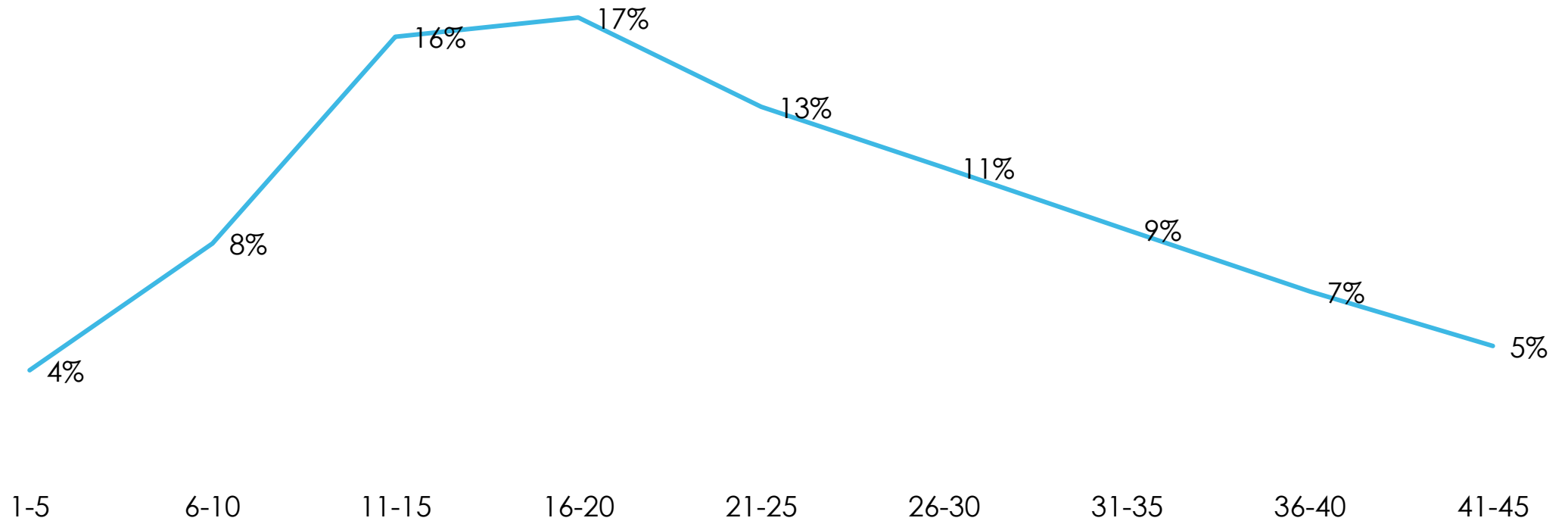
Different regions & markets are growing at different rates



Source: Oxford Economics GTS, Forecast as at November 2024, ABS Short-Term Visitor Arrivals 2010 to 2019.

Travellers are looking for a multitude of experiences

Global number of experiences travellers are interested in



Source: Tourism Australia Future of Demand 2022

Creating demand

Come and Say G'day Chapter 1 Results to Date

Campaign period October 2022 – June 2025

Advertising

Top 1%

of ads tested globally by
System1 Research

Marketing

+2pp

Increase in global
consideration across
brand markets.

Advertising

+15pp

Increase in consideration
amongst those who have
seen the campaign versus
not seen

Sources: System1, Ad Testing Results, FY23 & FY24; Tourism Australia, Consumer Demand Report via FiftyFive5, FY23 to FY25; Tourism Australia Consumer Demand Project, Tourism Australia, 2023 & 2024

Maintained our successful creative foundations



Distinctive character



Unique destinations
& experiences:
Fresh and familiar

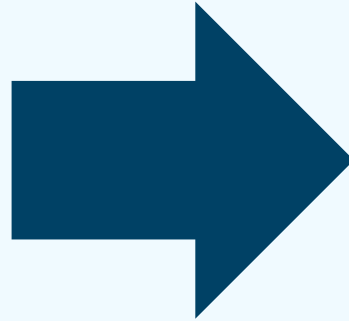


Warm &
welcoming
Nature



Indigenous
Creativity

Moving from global to a localised talent and storytelling for increased advocacy



UK



Australia



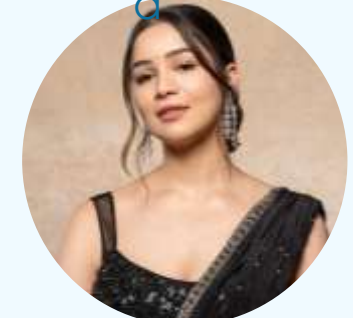
China



US



Japan



India

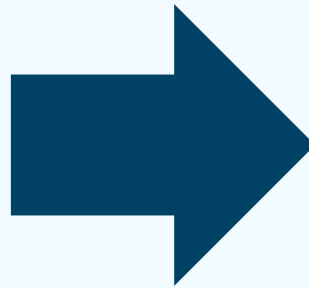
FROM:
One global onscreen talent

TO:
Localised approach to drive advocacy and
earned opportunities
in key markets

From a single global ad to market-by-market approach



FROM:
One global set of assets



TO:
A modular and more localised set of assets

Come and say G'day to the holiday that lasts a lifetime

We're going to show that *Australia leaves an impression on visitors*; one they can't help but share with the world.

The Compilation - from 5 brand market edits



Our work to support the cruise sector

How Tourism Australia supports cruising

Industry partnerships	Distribution	Marketing, Content & Public Relations	Research & insights
<p>Includes destination support at key global cruise-related industry events and partnership with CLIA & ACA to make Australia the premier cruising destination for high yield travellers.</p> 	<p>Includes working with key travel consortia who are engaged in the cruise sector.</p> <p>Agent training including the Aussie Specialist Program to target cruise-focused agents</p> 	<p>Using TA platforms to tell the story of some of Australia's iconic cruise itineraries.</p> 	<p>Includes supporting research into the economic impact of the sector such as pre/post visitation.</p> 



How to get involved

Stay connected via
tourism.australia.com

Continue to use #SeeAustralia or tag
@australia on your social posts

Please let the TA PR team know of any new product or updates, exciting news, stories or content you may have to share via
internationalmedia@tourism.australia.com

Social toolkit rolling out shortly...stay tuned!

Thank you

