

Tourism
Australia



Winning the Global Traveller: How Australia Competes for Demand

September 2026

Our focus:

Creating and
converting demand
& supporting
industry





Why it matters...

9.1m

Total visitors
in the past year

Up 8.3% year-on-year

\$57b

Total overnight spend
in the past year

Up 16% year-on-year

726k

Jobs in tourism
in the March 2026 qtr

Up 5% year-on-year

Source: ABS, Overseas Arrivals and Departures, June 2026.
TRA, International Visitor Survey (IVS), March 2026.
ABS, Quarterly Labour Statistics, March 2026.

Navigating Uncertainty – Long Term



● CAIRNS HARBOUR, QUEENSLAND

Tourism 2035



Our vision

*Be the first destination every
traveller dreams of, and the one
they ultimately choose*

How we deliver



Create demand

Marketing to make Australia the most desirable destination on earth.

Brand Campaigns



Business Events Marketing



PR & Social



Digital Marketing



Convert demand

Working with industry and partners to convert demand into expenditure.

Partnerships



Distribution



Aussie Specialist Program



Business Events Subvention



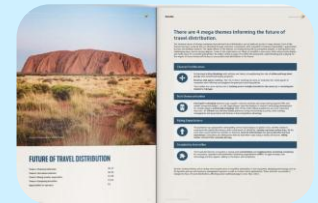
Support industry

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

Industry Engagement



Public Reports and Data



Trade Events



Signature Experiences / Discover Aboriginal Experiences



High Yielding Travellers:

Targeting those with the greatest potential

High-Yielding Leisure

Holiday and Visiting
Friends and Relatives

Luxury

Per Person
Spend per night:
> \$1,200

Working Holiday Makers

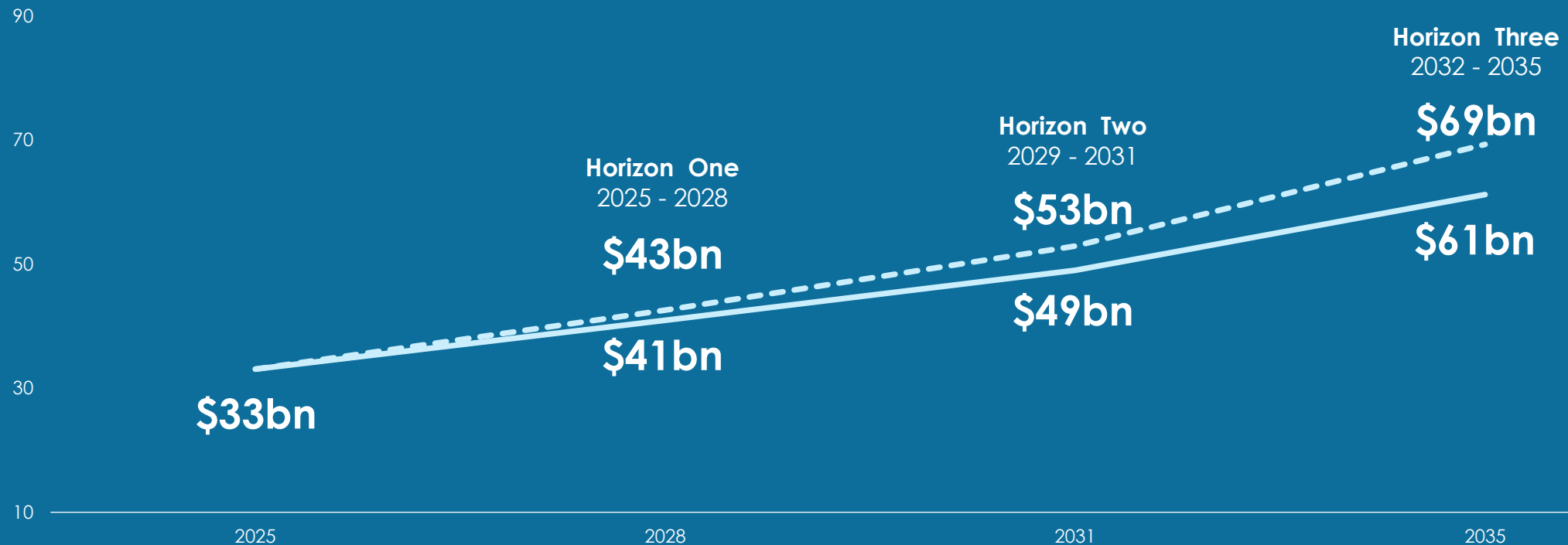
Working Holiday
Makers are high yield
via length of stay and
regional dispersal

Business Events

Purpose: Business
Events incentive
and association

Tourism potential to 2035

Total trip expenditure Leisure (Holiday, VFR), WHM, and Business Events
2025 – 2035 forecast, billions AUD, nominal, lower band target and upper band stretch target



Note: Underlying L.E.K. modelling was based on Spend in Australia and carried out in detail for the top 30 markets only. Scaling has been applied to both derive Total Trip Spend (based on the FY2025 proportionality) and account for all markets (based on historical movement in the share of other markets) at the segment level of granularity. Modelling completed in late 2025.
Source: L.E.K. Consulting Australia Pty Ltd, 'Modelling for Tourism Australia 2035 Strategy Project' Report], December 2025.

Incremental expenditure by 2028



Tourism Australia has four immediate priorities to create and convert demand



1. Showcase Australia's unrivalled breadth.



2. Win in marketing to humans and machines.



3. Capitalising on major events.



4. Define a distinctive luxury positioning for Australia.

Continue to showcase Australia's unrivalled breadth

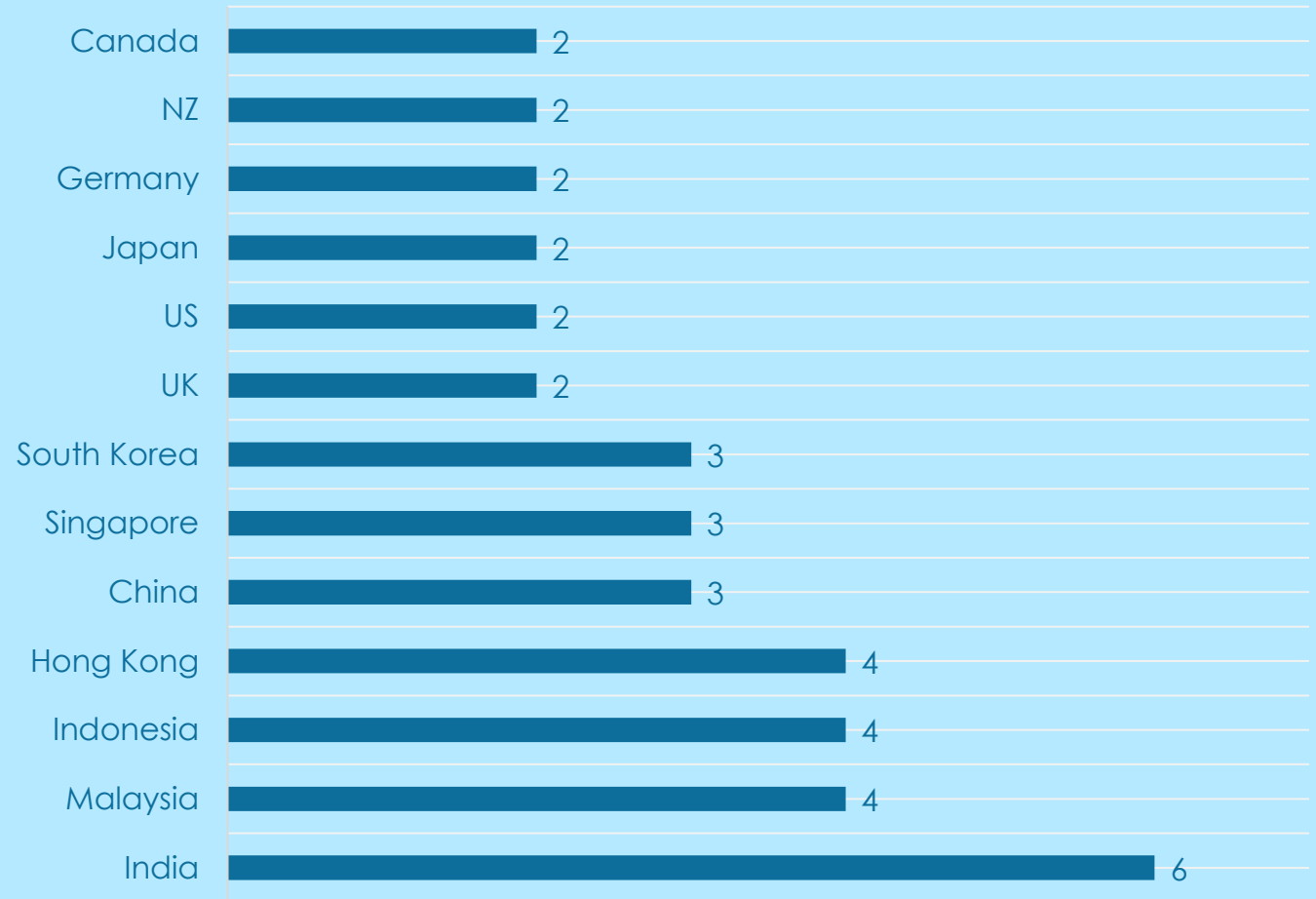




Continue to
showcase
Australia's
unrivalled
breadth

Travellers consider three destinations on average

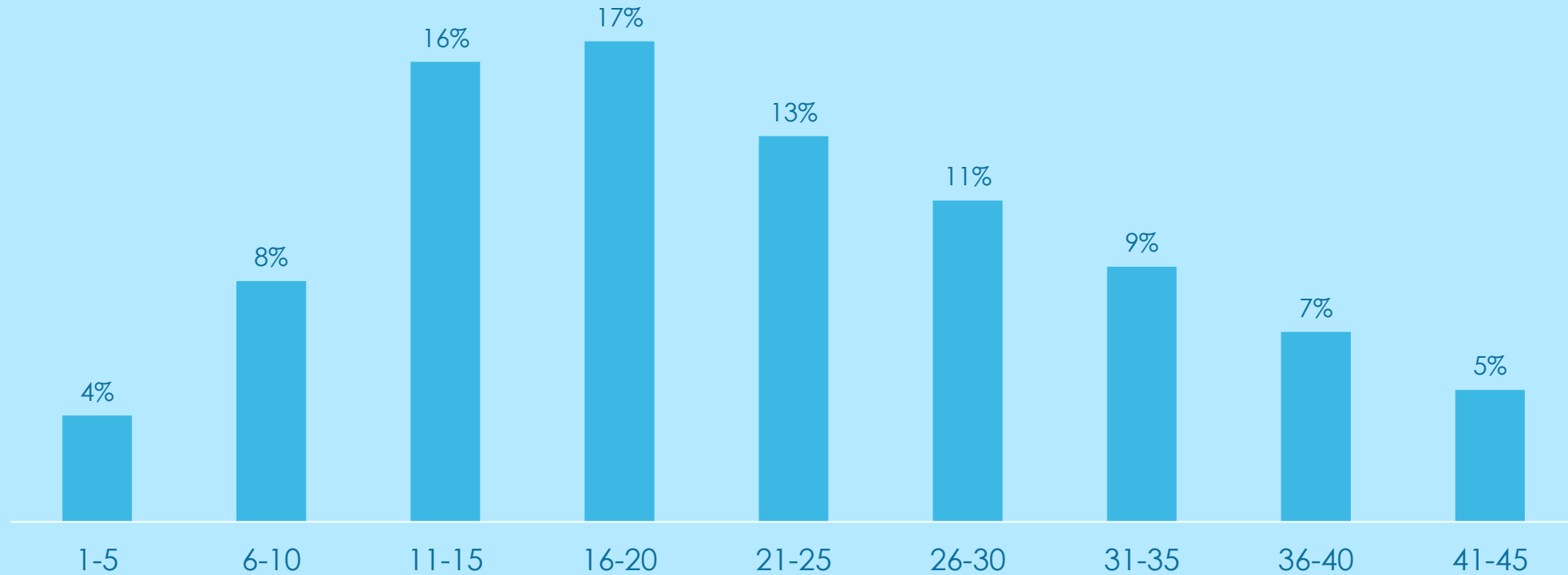
Number of Destinations considered by
markets



Question: OOR travellers considering international travel to how many destinations in the next 2 years)
Source, data: Tourism Australia via Rob Brittan, analysis of Tourism Australia's Consumer Demand Project, 2021;
Source, quote: McKinsey & Company, The new battleground for marketing led growth, McKinsey Quarterly February 2017.

That's a problem because in this category: variety = value

Global number of experiences travellers are interested in



Source: Tourism Australia Future of Demand 2022

Our objective:
To increase consideration,
conversion and dispersal

● TOWNSVILLE, QLD

Marketing to humans and machines.

● ESPERANCE, WESTERN AUSTRALIA

Travel planning has a new starting point

Travellers now trust AI more than influencers to plan travel: **24% vs 14%**.

56% of US travellers used AI to plan a trip last year, up from 33%.

81% of Chinese travellers use AI for trip inspiration, more than anywhere else.

AI-referred traffic to travel sites is up **2,215%** since late 2024.

Sources: Booking.COM Global AI Sentiment Report 2025 (37,325 consumers, 33 markets); Phocuswright, The AI Surge, 2026; Simon-Kucher Global Travel Trends, 2025; Adobe Analytics, June 2026



● ELEPHANT ROCKS,
WESTERN AUSTRALIA

We're already seeing the impact



Organic traffic to
Australia.com **-27% YOY**



Traffic from LLM crawlers
has grown **245% YOY**

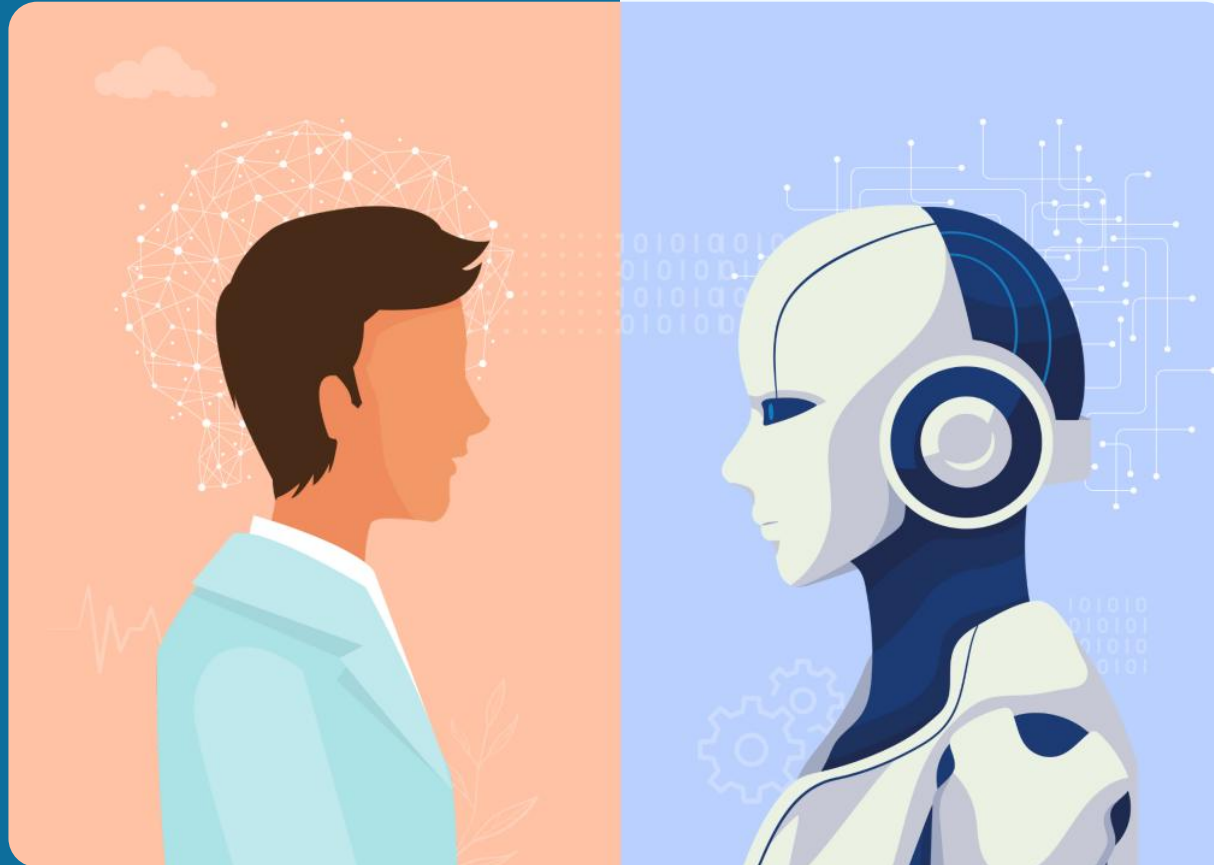
Source: Adobe Analytics July 25 – June 26

Humans

Win Hearts

Build desire

Tell stories that
move people



Machines

Win algorithms

Build presence

Feed the sources
AI trusts

Our objective:
To make Australia the
answer, wherever the
question is being asked



● GREAT BARRIER REEF, QLD

Capitalise on major events



Australia's Green and Gold Decade



British and Irish Lions 2025



The Ashes 2025/2026



Men's Rugby World Cup
2027



T20 Cricket World Cup
2028



Brisbane Olympic &
Paralympic Games 2032



T20 Cricket World Cup 2022



FIFA Women's World Cup 2023



AFC Women's Asian Cup 2026



Netball World Cup 2027



Women's Rugby World Cup
2029

Complete

Tourism Australia's Major Events Strategy

Use the global spotlight of major events to inspire future holidays and business events for all of Australia through destination marketing.

Major Events marketing examples



FIFA Women's World Cup

Equivalent Advertising Value = **\$81.7M** (Target: \$20M)



Summer of Cricket

Equivalent Advertising Value = **\$230M** (Target: \$30M)



British & Irish Lions

Video Views = **24.9M** (Target: 20.1M)

Our objective:
To leverage the moment
and amplify our
marketing whilst the
eyes of the world
are on Australia



● SOUTH BRISBANE < QLD



Define a distinctive luxury positioning

● FLINDERS RANGES, SA

Changing global expectations of luxury create an opportunity for Australia.



● SAL SALIS, WESTERN AUSTRALIA

Not all Luxury Travellers are the same



Our objective:
To create a unified
luxury positioning
and pipeline of
experiences



● TRUE NORTH, WESTERN AUSTRALIA

● LADY MUSGRAVE ISLAND

Be the first destination every traveller dreams of,
and one they ultimately choose.

Thank you

● GREAT BARRIER REEF, QLD