

fiftyfive5
Part of Accenture Song



Tourism Australia & Fiftyfive5

TAS

March 2026

● WINEGLASS BAY



Agenda

1. **Tourism Australia:** Now and next.
2. **Fiftyfive5:** Consumer Demand Project (CDP)

● MOUNT FIELD NATIONAL
PARK,

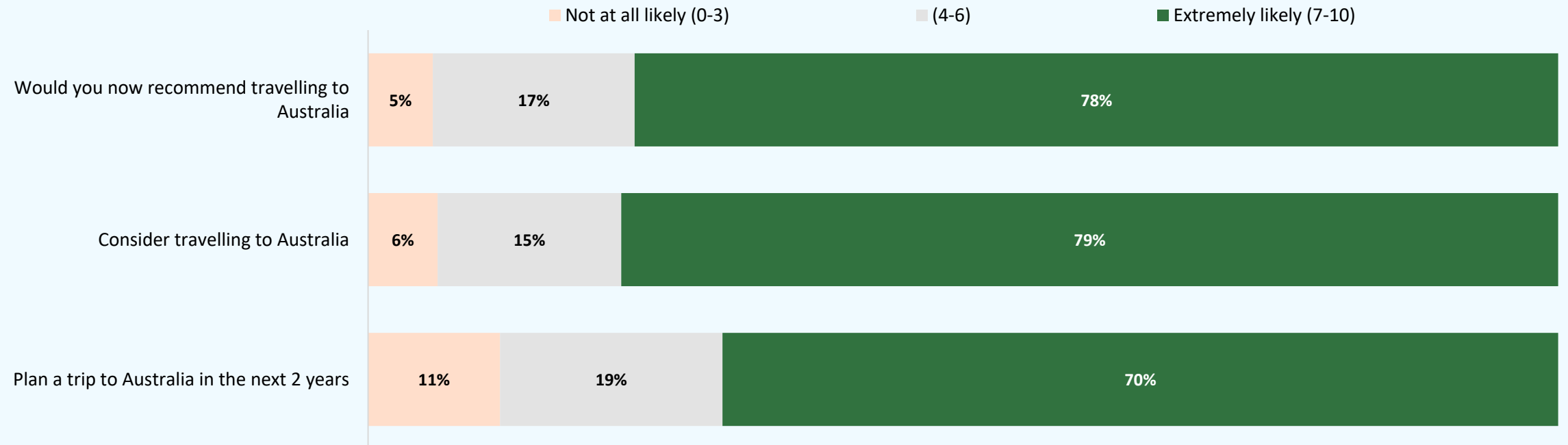
Now

Next
(Tourism 2035)

Midst of the global launch of *Come & Say G'Day 2*

Initial results are promising

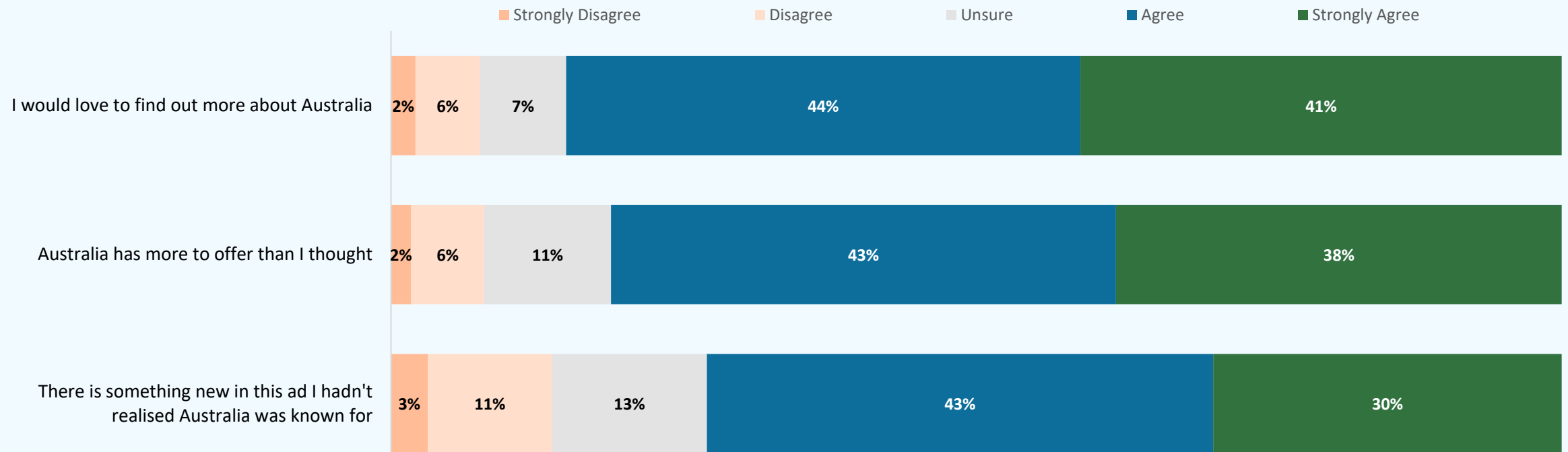
Thinking about the ad you've just seen for Australia, please let us know how likely you would be to do each of the following?



Source: Tourism Australia, Consumer Demand Project, via FiftyFive5, September 2025.

9 in 10 travellers want to find out more about our destination

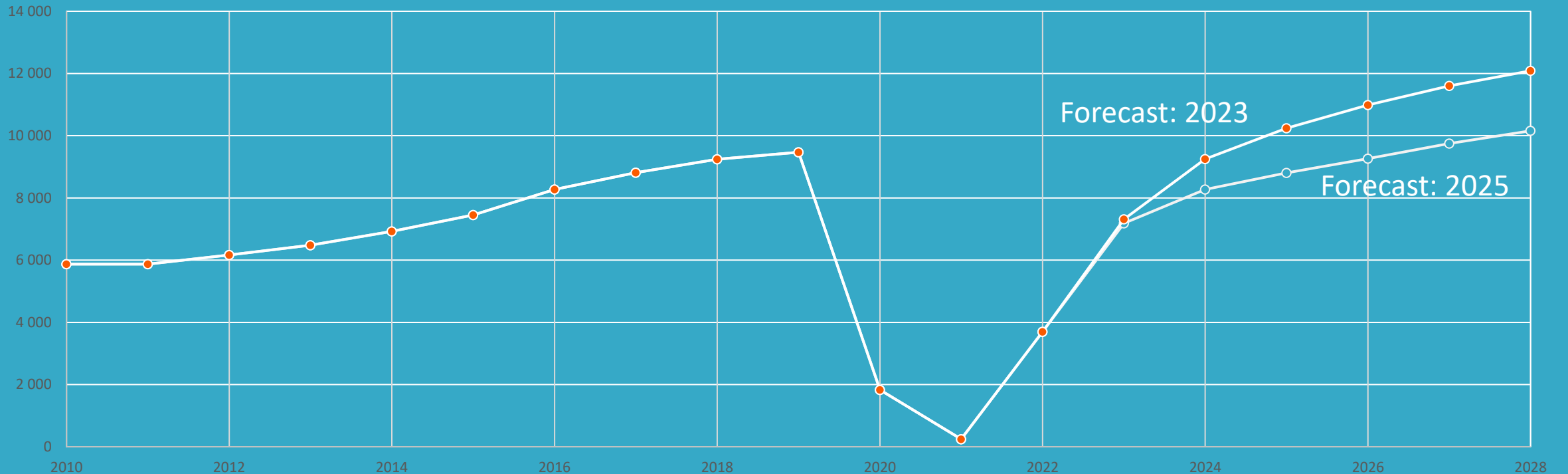
Thinking about the ad you've just seen for Australia, please let us know how likely you would be to do each of the following?



Source: Tourism Australia, Consumer Demand Project, via FiftyFive5, September 2025.

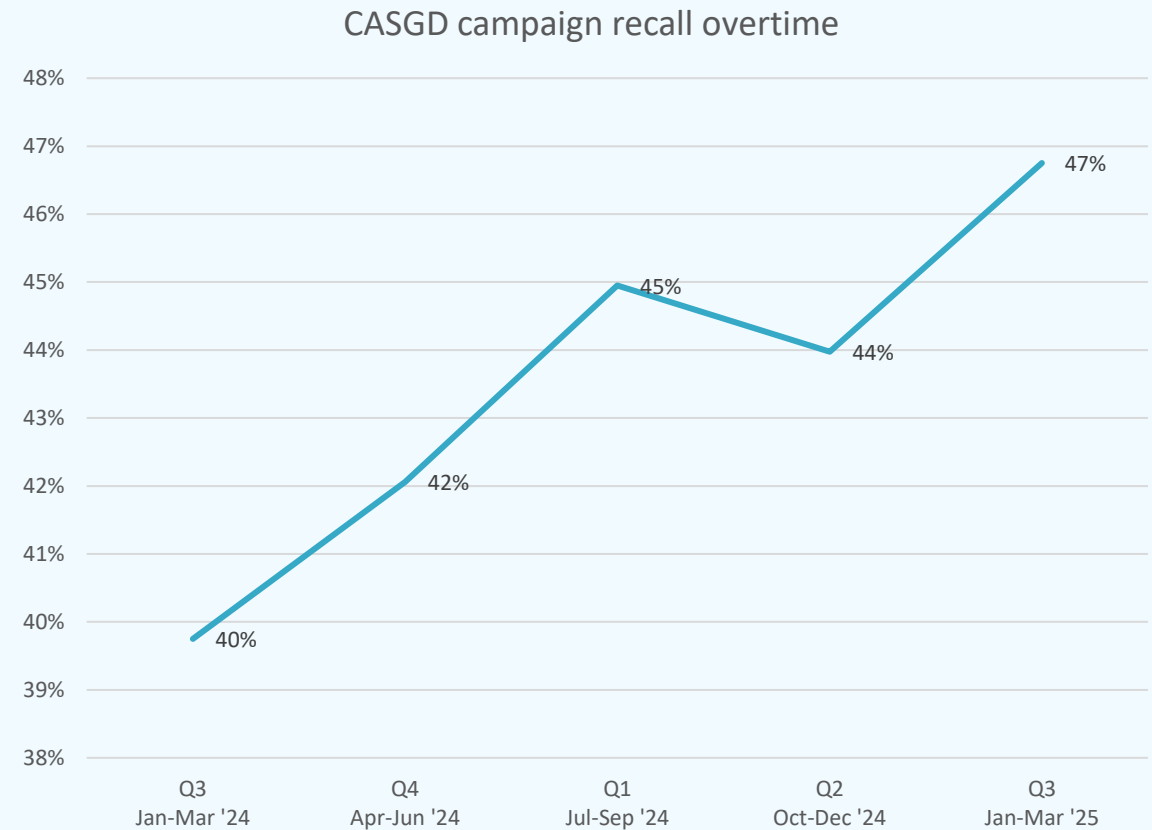
In an unpredictable and challenging international landscape

International Arrivals Forecasts



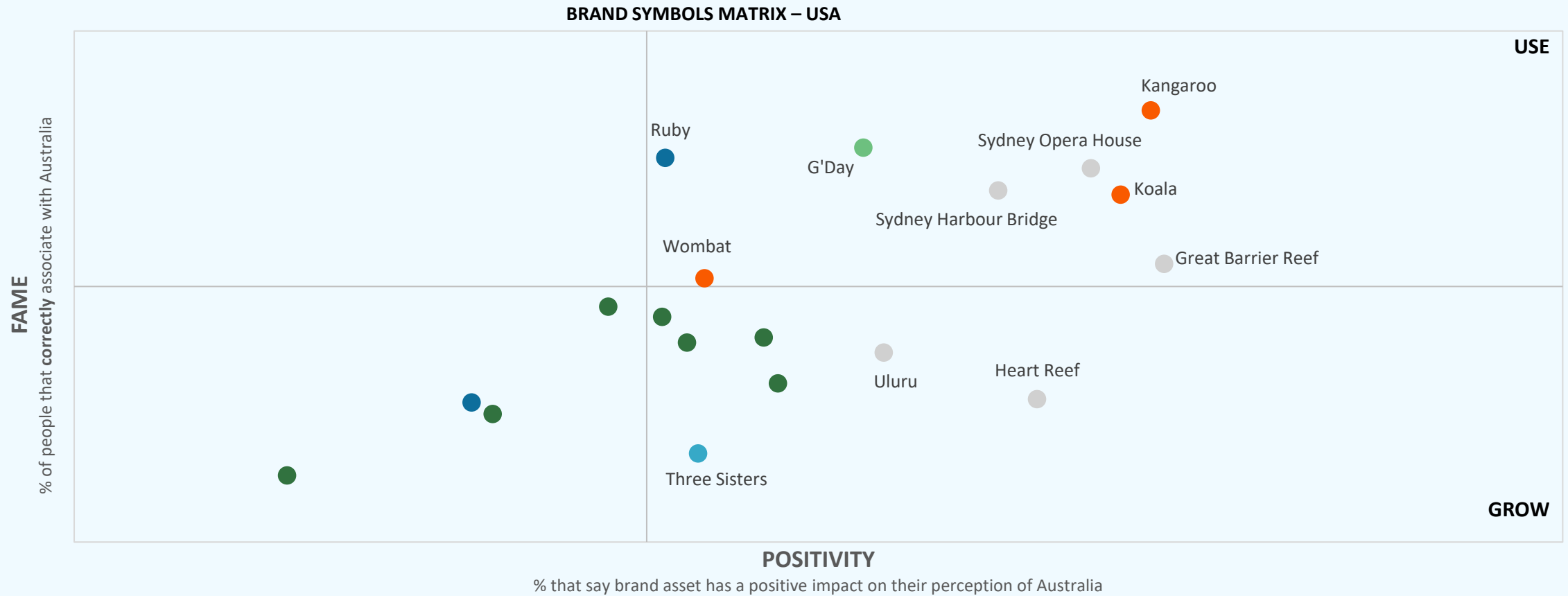
Confident in our work and partnerships: taking a long-term approach

3 YEARS
average decay rate



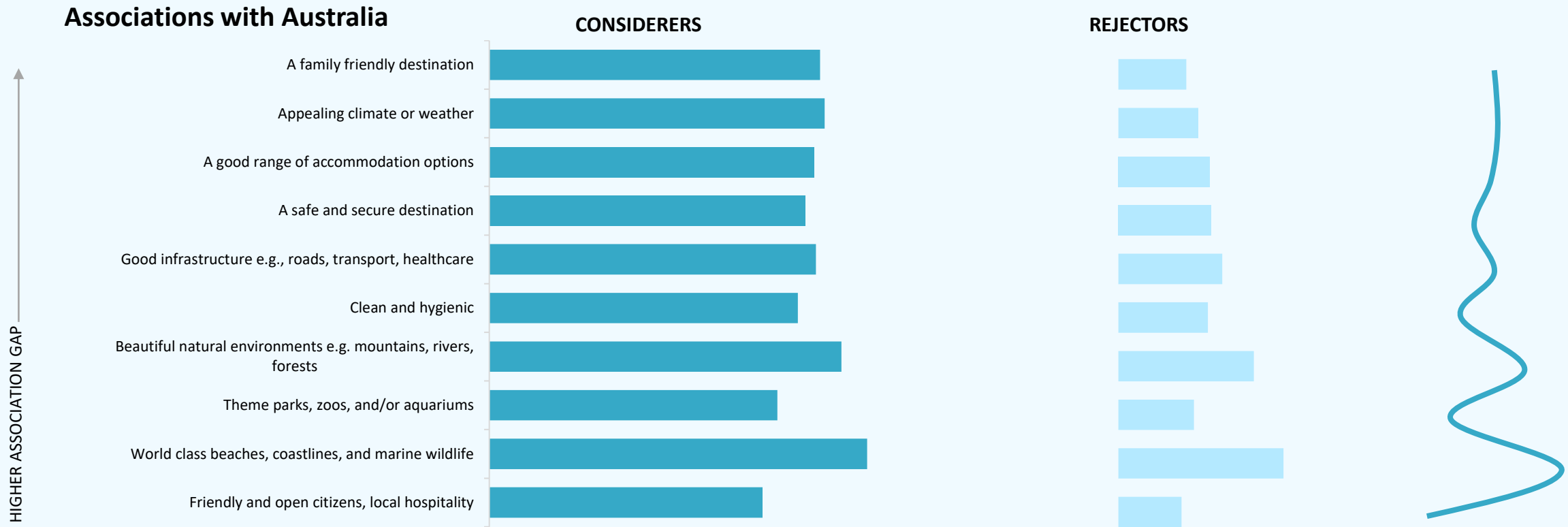
Source: LEK analysis for Tourism Australia, 2024; Consumer Demand Project, via Fiftyfive5 for Tourism Australia, 2025.

Tackling misattribution in marketing.



Source: Consumer Demand Project, via Fiftyfive5 for Tourism Australia, 2025.

Aiming to assist more travellers see themselves on an Australian trip.



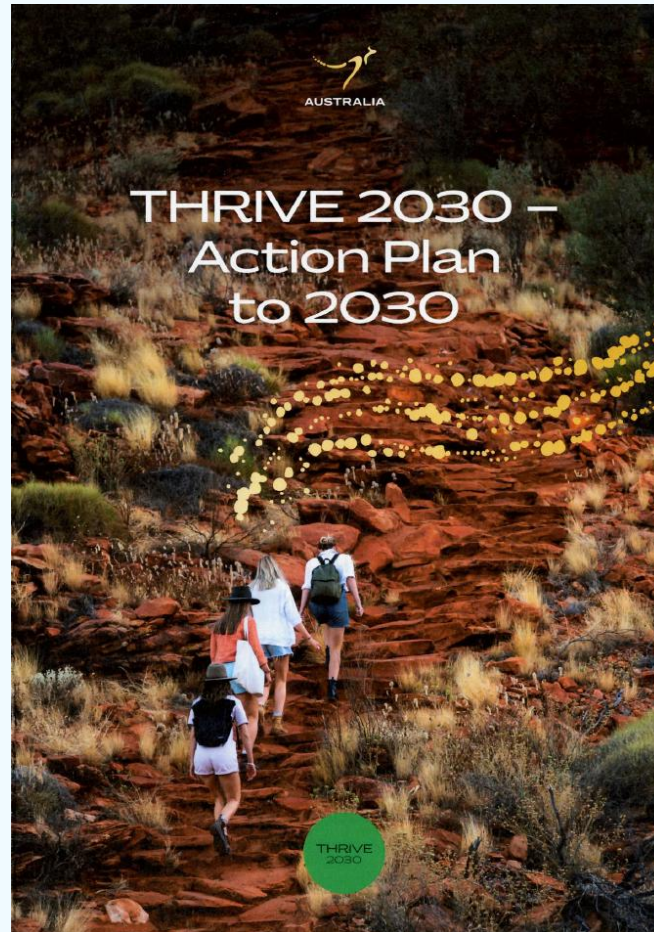
Source: LEK analysis for Tourism Australia, 2024; Consumer Demand Project, via Fiftyfive5 for Tourism Australia, 2025.

Now

Next
(Tourism 2035)

Development of Tourism Australia 2035 strategic plan: Tourism 2035

A function of THRIVE



Actions

1. Grow international visitation and expenditure from established and emerging inbound markets, including in Southeast Asia and India, by:

	Lead Agency (Partner)
a. Delivering the Tourism Australia Demand Strategy 2035 and the next stage of Tourism Australia's Come and Say G'day campaign, with \$130 million invested to encourage international travellers to book an Australian holiday.	Tourism Australia
b. Developing and then implementing an International Diversification Strategy for the visitor economy to build industry's resilience, capability and understanding of new markets, capture new growth opportunities and broaden the spread of valuable visitor markets.	Tourism Australia, Austrade
c. Delivering a competitive and fit-for-purpose Approved Destination Status (ADS) scheme for Chinese group travel through an \$8 million investment over 4 years and ongoing funding.	Austrade (Home Affairs)
d. Supporting and enabling international visitation and market growth through balanced, agile and efficient management of the visitor visa program.	Home Affairs
e. Modernising and streamlining traveller border clearances for air and cruise travellers, including through trialling digital incoming passenger cards, while maintaining strong security and biosecurity protections for Australia.	ABF, DAFF

Aligned to THRIVE 2030 Priorities 5 and 6

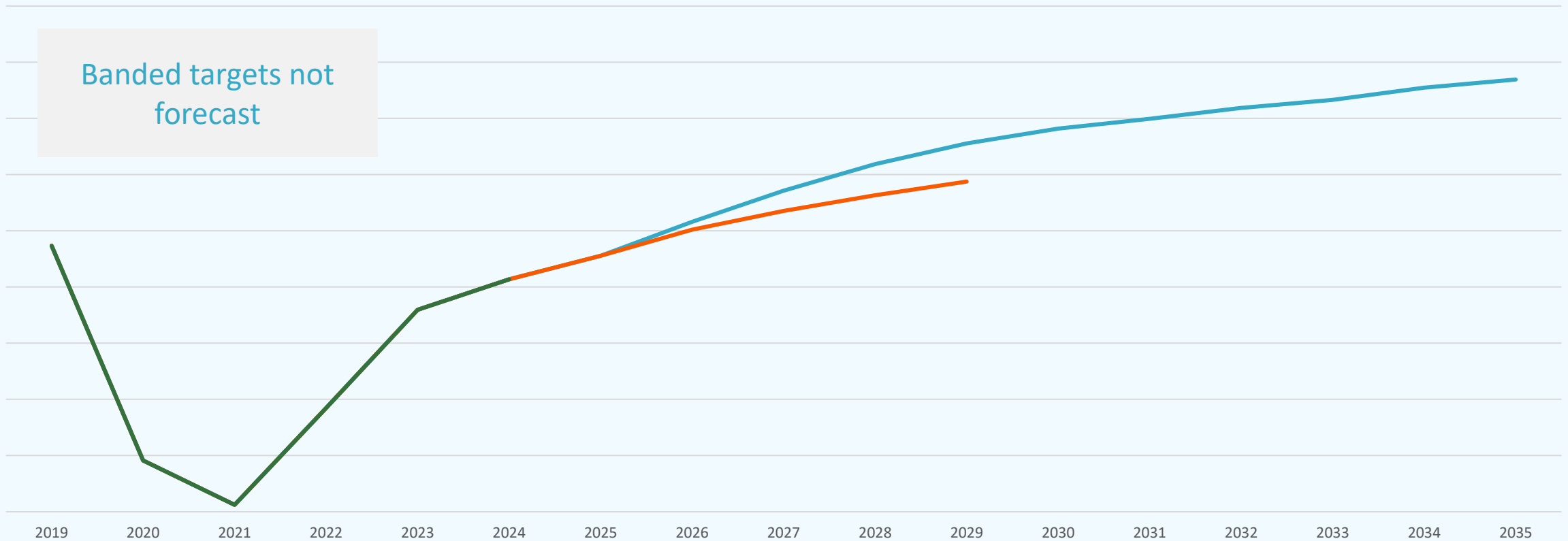


Indicators to assess international visitation

- Expenditure; visitors and trip nights from international markets, including India and target Southeast Asian markets.
- International desirability of Australia as a holiday destination and positive international visitor sentiment (LIVE indicators).

Where, nationally for BE and leisure, could we be in 2035?

Two inbound total visitor arrivals forecast



Identified core forces driving travellers decisions



Asking the question: How should TA should respond, beyond our typical operations?

Create Demand

Grow Australia's desirability

Appeal to high yielding travellers

Promote dispersal around Australia

Convert Demand

Create strategic partnerships

Support Industry

Generate insight to aid industry

Promote industry growth

Foster communication with Industry

3 to 5 additional focuses.

Developed through nation wide sessions & focus groups.

We're better together.

Consumer Demand Project (CDP)

A short overview of CDP



Monthly tracking of OOR Travellers

People who either have travelled outside of their region within the last 5 years for leisure purposes and/or intend to travel outside of their region for leisure within the next 2 years



16 international source markets + Australia

Vietnam added from July 2025



Multi-dimensional reporting

Results are often shown at a global aggregate (excluding Australia and Vietnam), with regional and market level cuts shown as appropriate



Flexible survey design

Flexi questions are included throughout the year including annual deep dives into Australian Destinations

The path to decision is not linear, but broadly spans three phases



Dreaming

“The bucket list”

Aspirational
equity

SALIENCE

DESIRABILITY

*Perpetual – outside
of a specific need*



Imagining

“Where would I like to go?”

Destination
equity

AWARENESS

CONSIDERATION

CHOICE DRIVERS

*In context of a ‘considered’
international holiday*



Evaluating

“Where ticks the most boxes?”

Planning
presence

PLANNING

TOUCHPOINTS

BOOKING

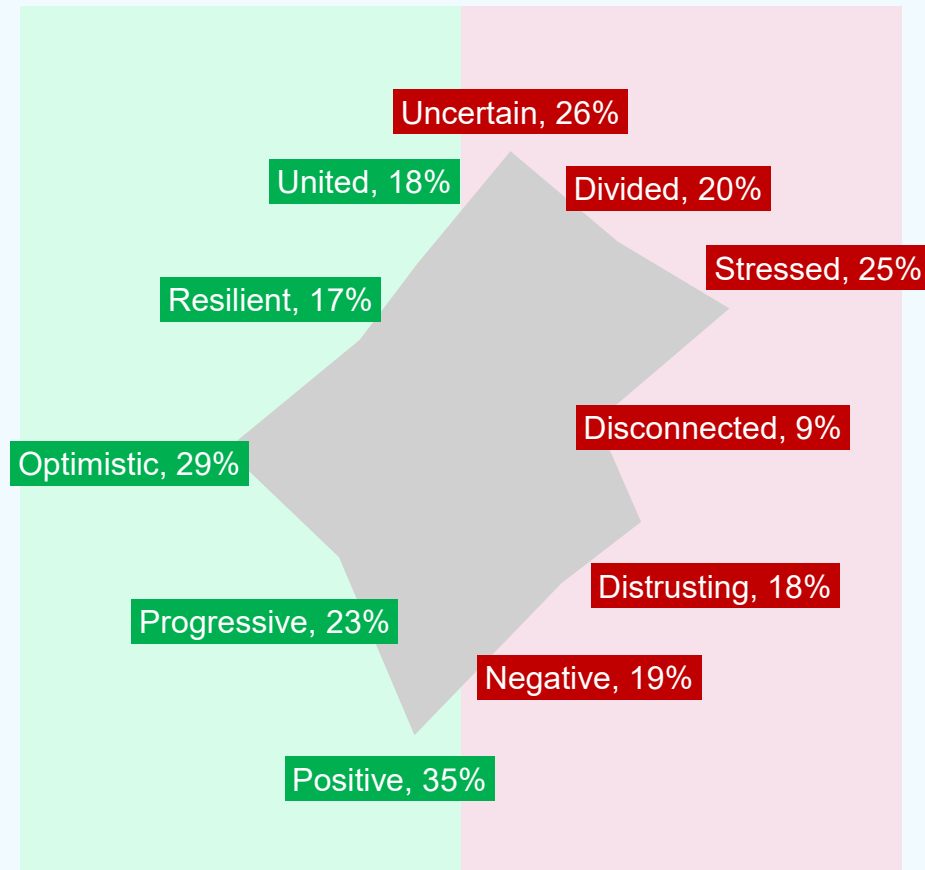
*Tangible evaluation of
trip specifics*



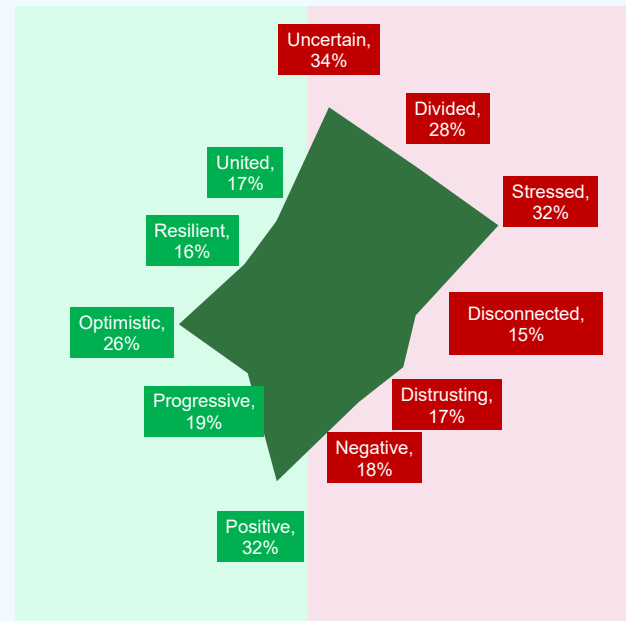
As of mid-2025, the mood around the world was divided, with North America and the UK & Europe feeling stressed and **uncertain**

Mood of the nation – (June 2025)

Global

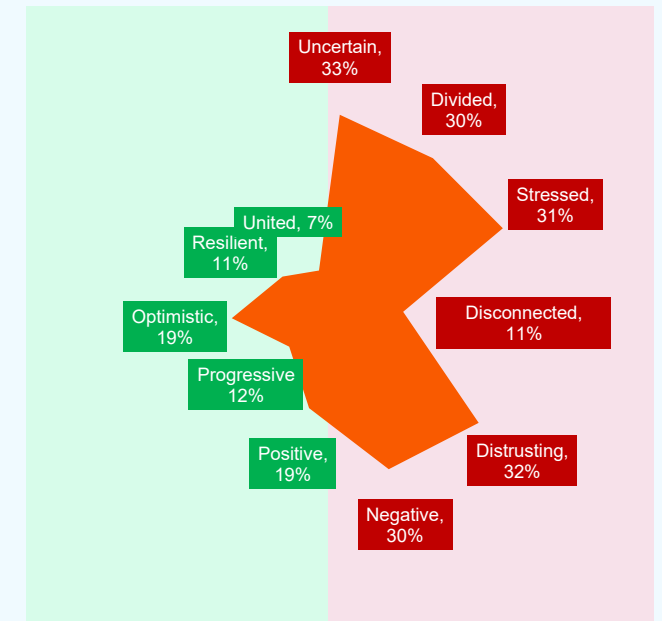


North America



UNCERTAIN – USA 36%

UK & Europe



UNCERTAIN – Germany 45%, UK 44%, France 42%

UNCERTAIN – New Zealand 48%

Destination Equity: Australia

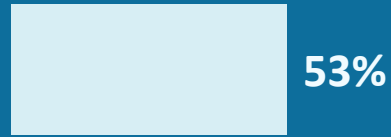
Australia has strong awareness and consideration...

Destination Equity

Conversion:

Awareness

Familiar with Australia



73%

Consideration

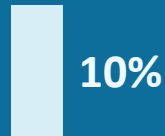
Considering Australia within 4 years



26%

Planning

Planning to visit Australia within 2 years



21%

Booked

Have booked some aspect of a trip to Australia

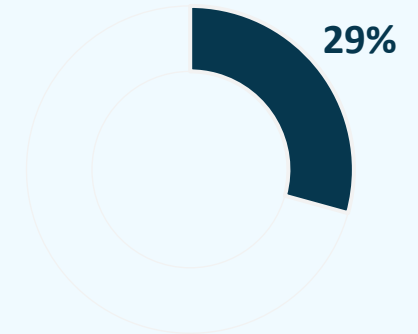


...and is one of the most desirable destinations in the world

Aspirational Equity

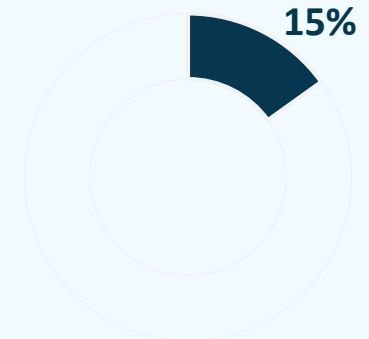
Salient

The proportion of OOR travellers who think of Australia without prompting



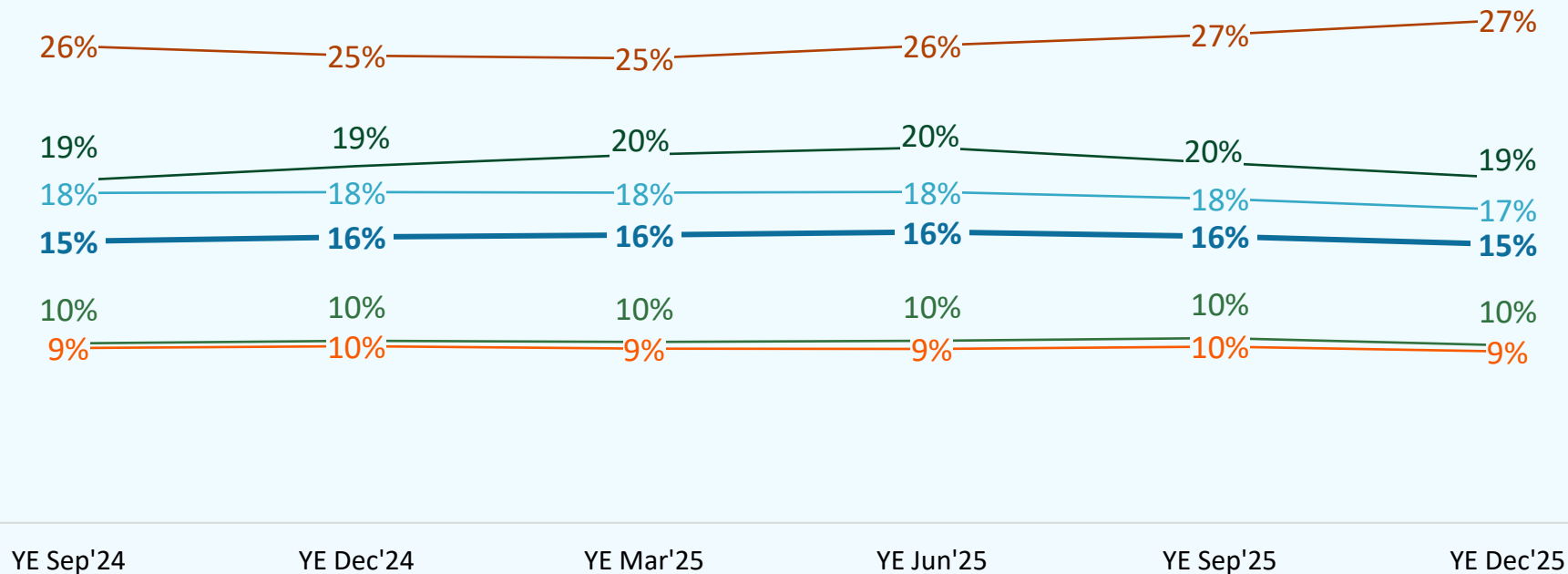
Desirable

The proportion of OOR travellers who rank Australia in their top 3 desirable destinations



Globally, desirability for Australia among OOR travellers is stable & strong, increasing among New Zealand OOR travellers over time

Australia's desirability over time – by source regions

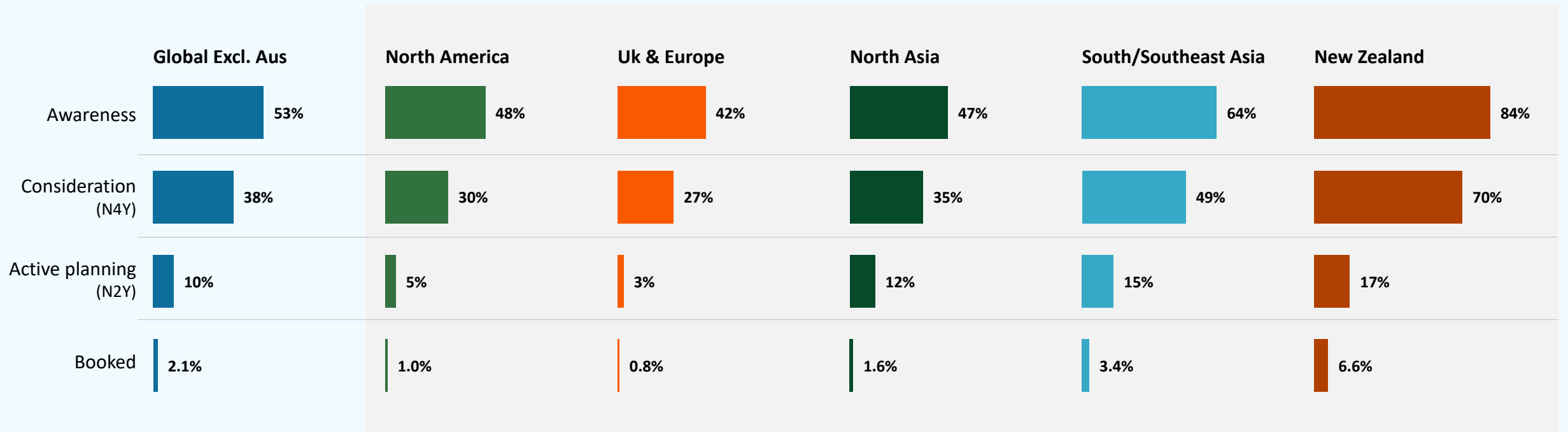


Region	YoY
Global	-0.4%
North America	-0.3%
Uk & Europe	-0.3%
North Asia	-0.6%
South/ Southeast Asia	-1.0%
New Zealand	+1.9%

YoY = latest YE period compared to the same period a year earlier

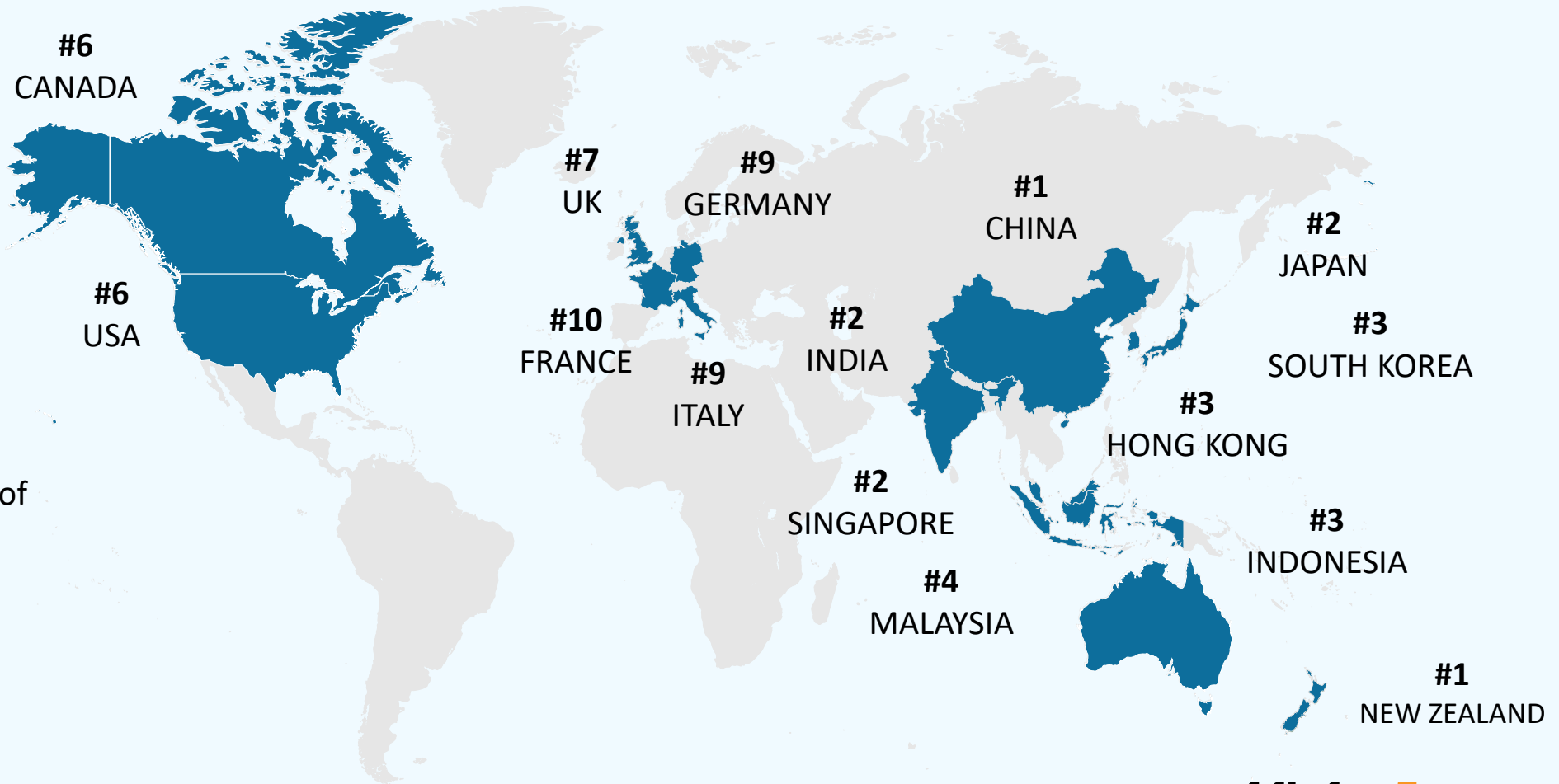
Australia has strong destination equity globally, particularly strong in S/SE Asia and NZ

Australia's destination equity – (Jan-Dec 2025) by source regions



Australia ranks in the top 3 destinations across NZ and Asia for consideration, with Japan typically competing for #1 spot

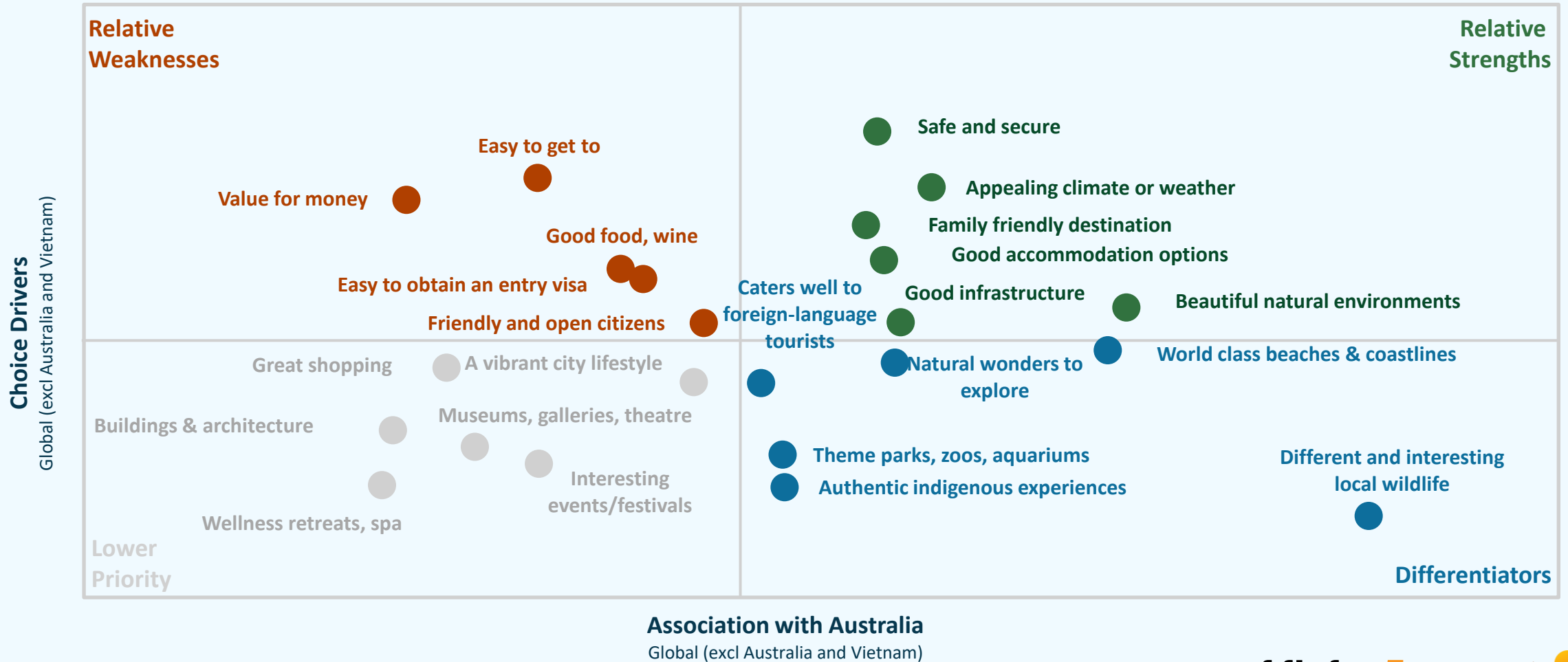
Australia's consideration rank order by market – (Jan-Dec 2025)



- the rank order of Australia's **consideration** vs other competitor destinations

Australia has several strengths to leverage including our beautiful natural environments, while differentiators such as wildlife add to our distinctiveness

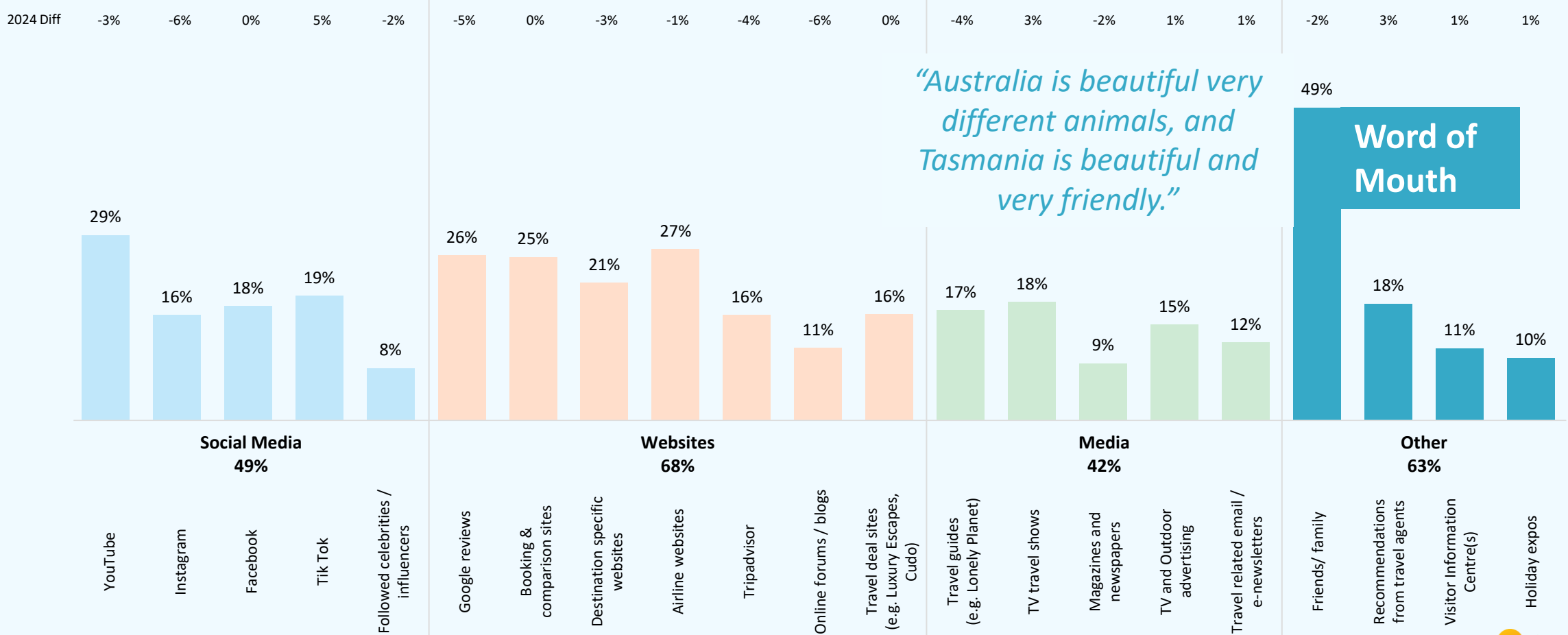
Perceptual map – Choice Drivers by Australian Associations



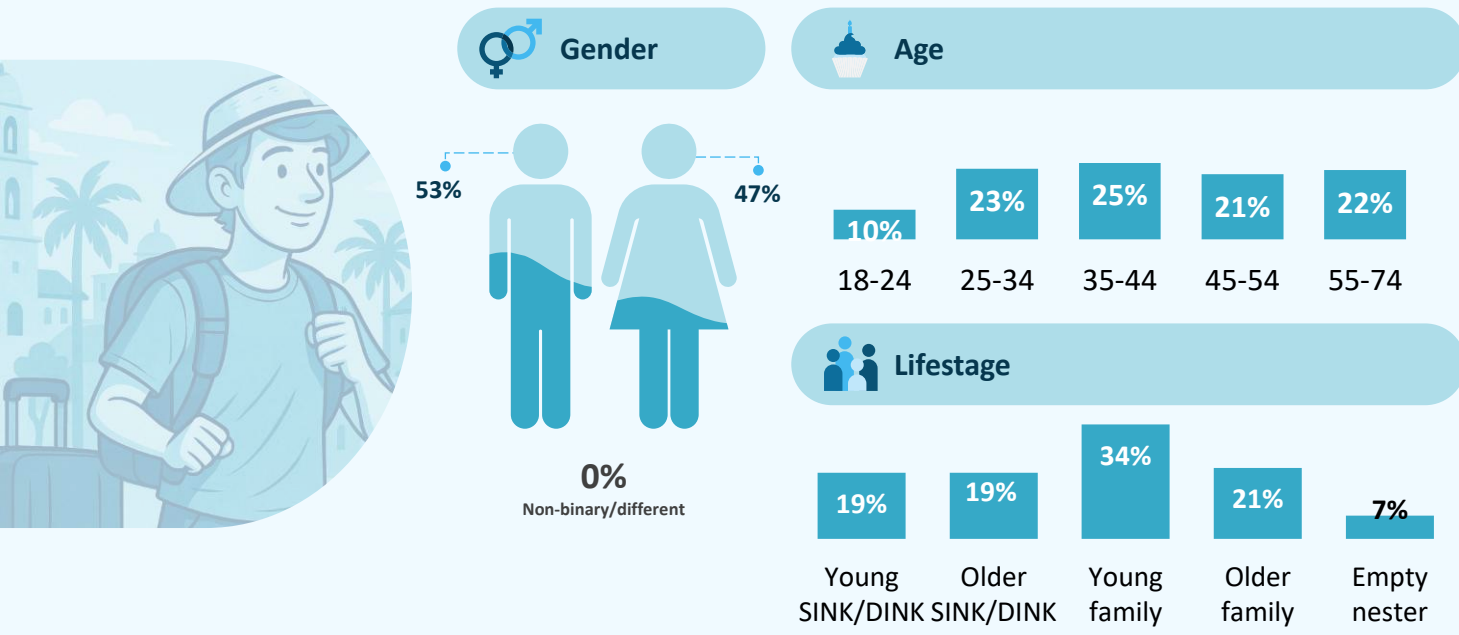
Destination Equity: Tasmania

Friends and family are the key source of ideas and inspiration for those who travelled to Australia during last 5 years

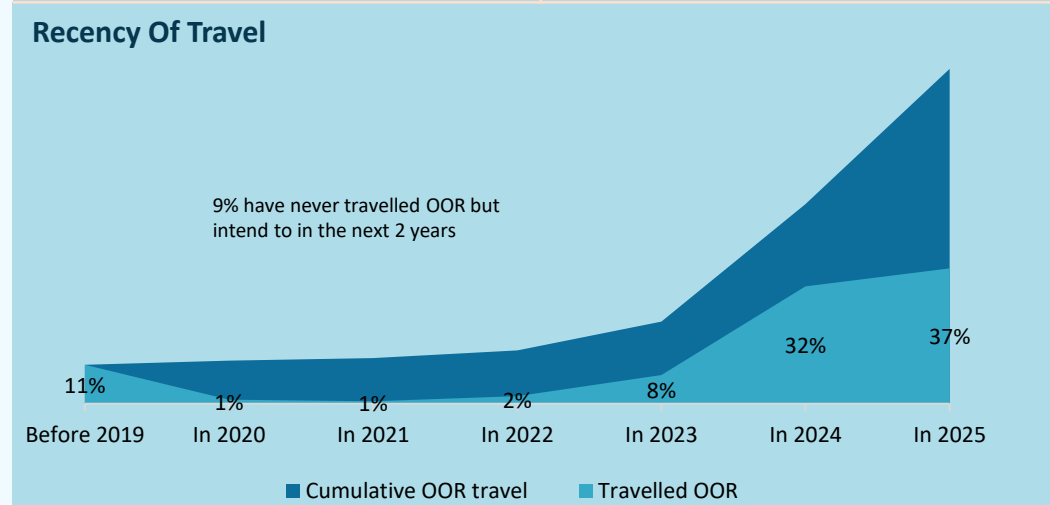
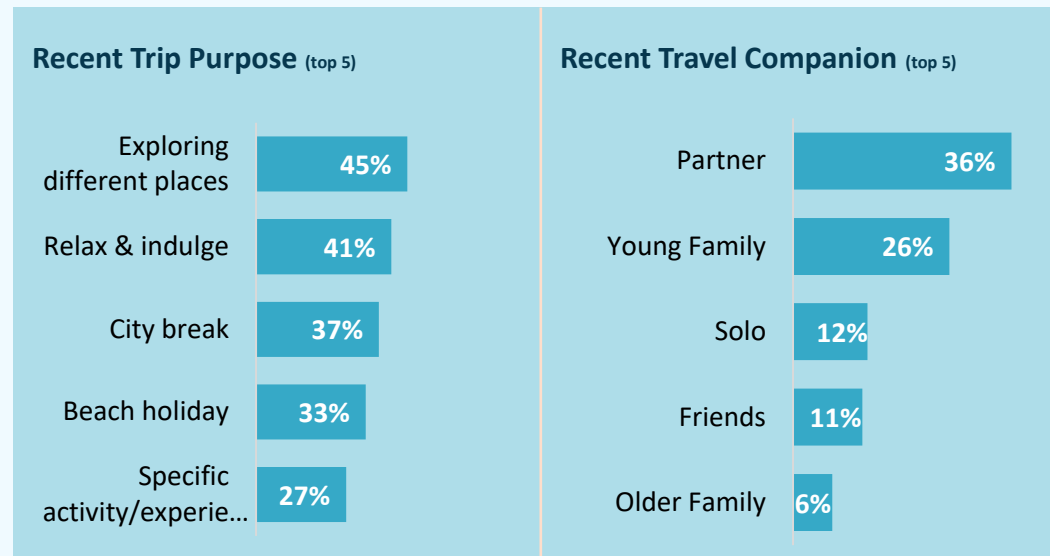
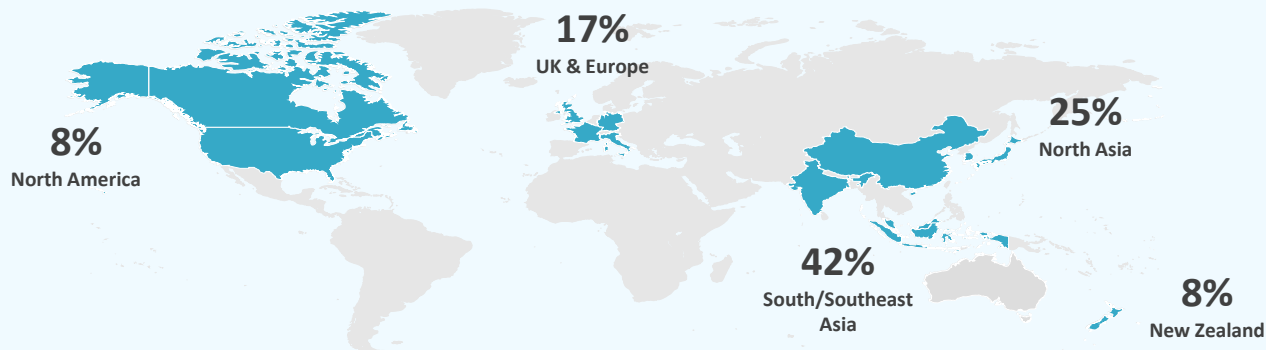
Sources used to research ideas and inspiration for the trip – those who travelled to Australia



Considerers of Tasmania Snapshot (Out of region travellers)

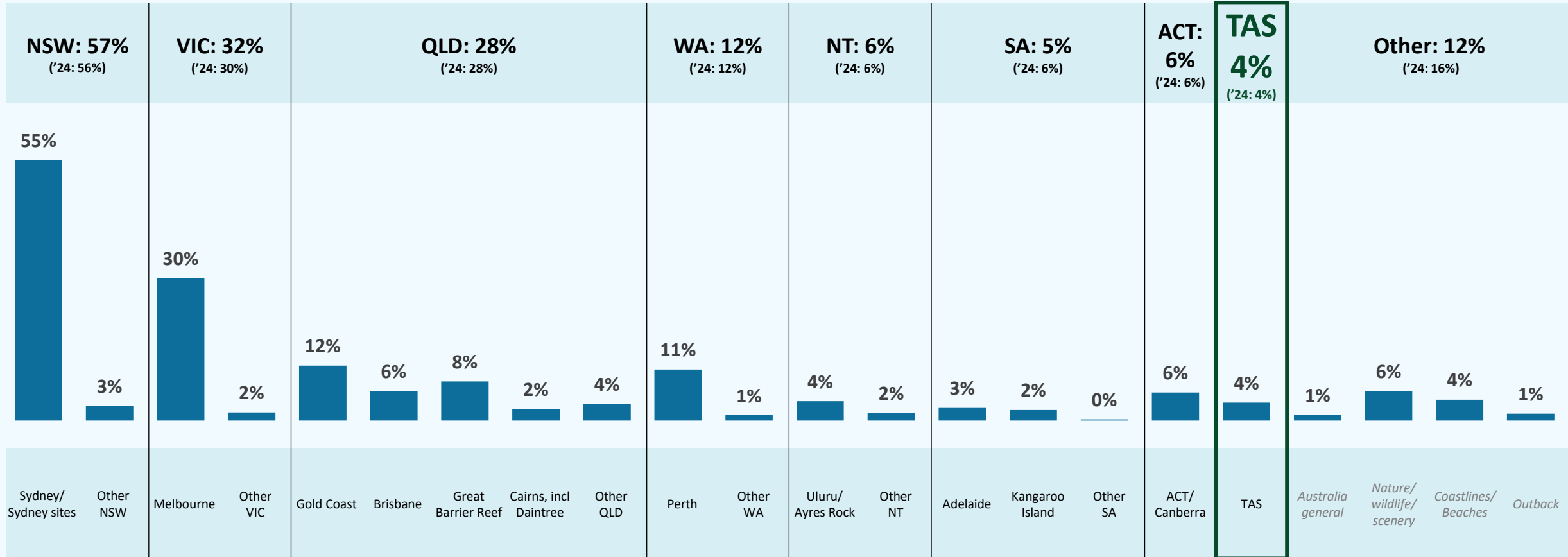


Region



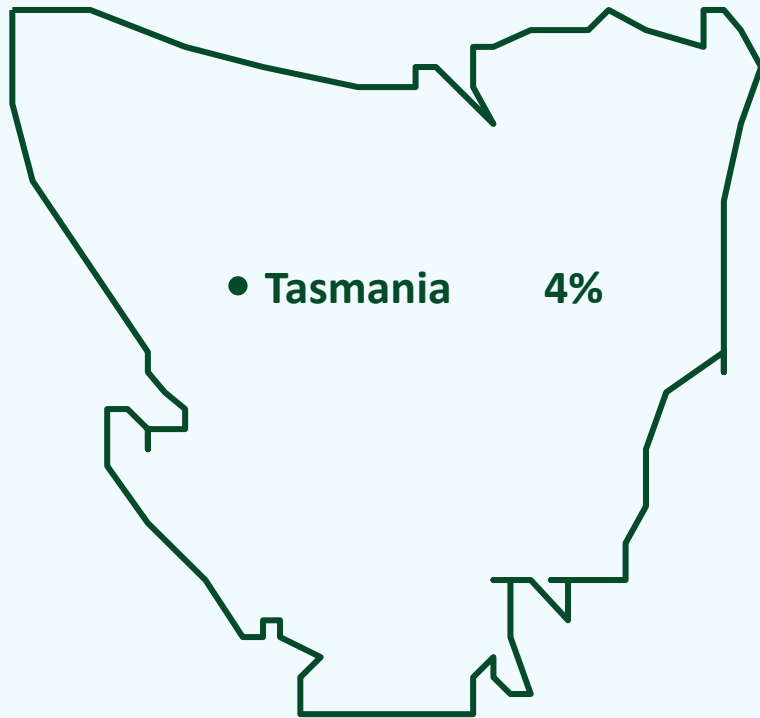
Globally, familiarity with Tasmania is relatively low at 4%, but comparable to many other Australian destinations

Most Desirable Australian Destinations: **Global** OOR travellers – (Oct-Dec 2025)



Tasmania's unprompted desirability level is higher in the UK, Malaysia, NZ, Hong Kong and Singapore

Most desirable Tasmania destinations: by source market – (Oct-Dec 2025)



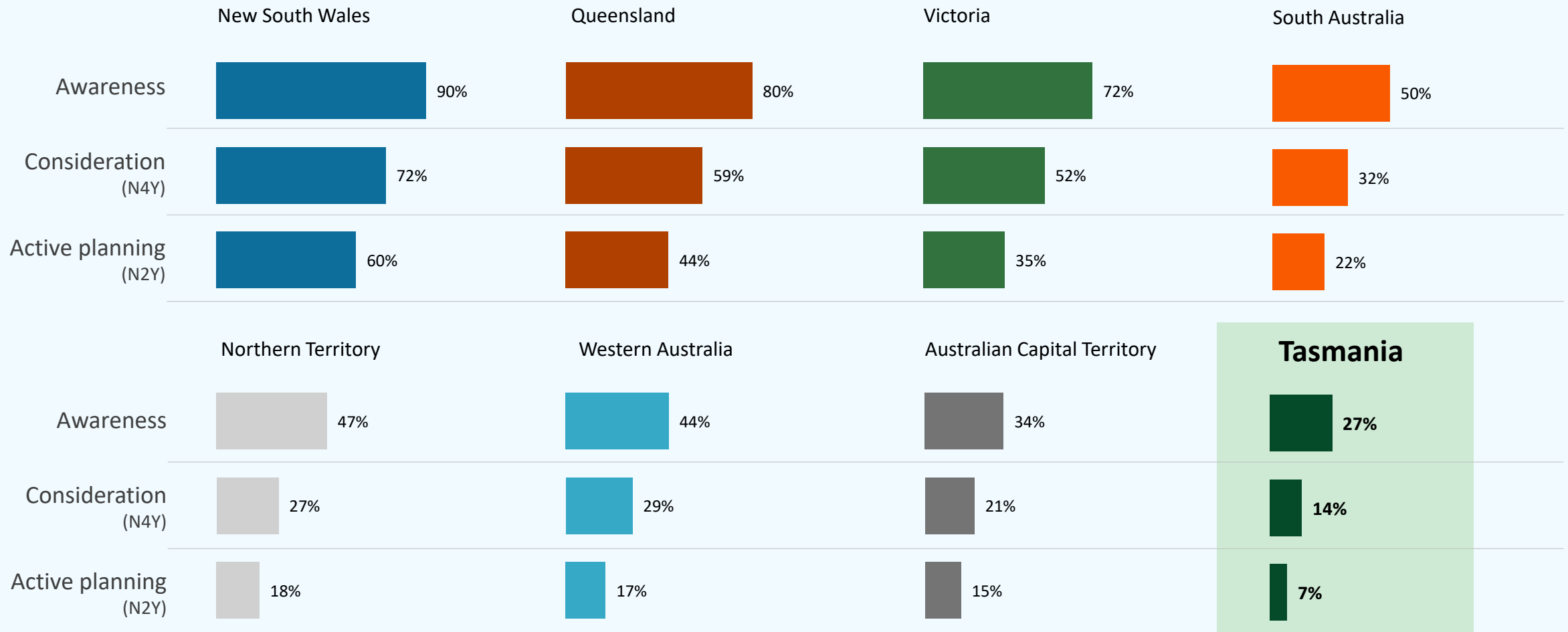
Source Market	TAS %	TAS Rank (compared to other STOs)
United Kingdom	5%	#7
Indonesia	3%	#8
Italy	2%	#8
South Korea	3%	#7
Malaysia	6%	#6
Germany	3%	#7
India	3%	#8
France	2%	#8
Canada	2%	#8
Japan	2%	#7
New Zealand	6%	#6
China	2%	#8
USA	3%	#7
Hong Kong	9%	#5
Singapore	7%	#5
Australia	20%	#5



CRADLE MOUNTAIN- LAKE ST CLAIRE NATIONAL PARK

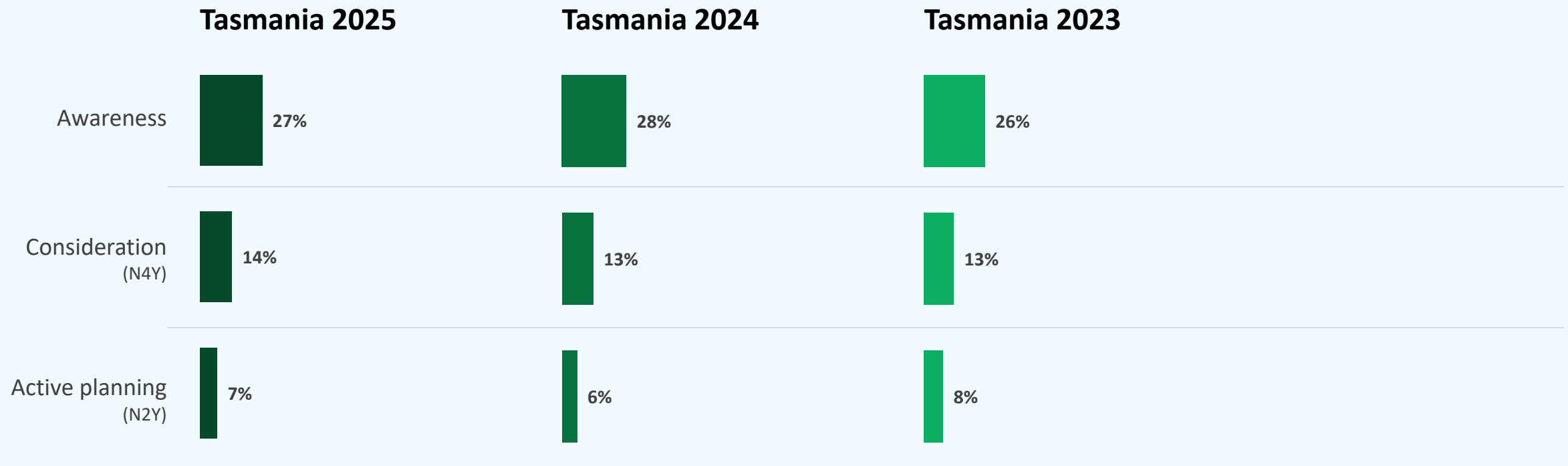
Of OOR Travellers considering Australia, just over a quarter are familiar with Tasmania and one in seven are considering visiting

Australian destinations equity among OOR travellers considering Australia, split by state/territory – (Oct-Dec 2025)

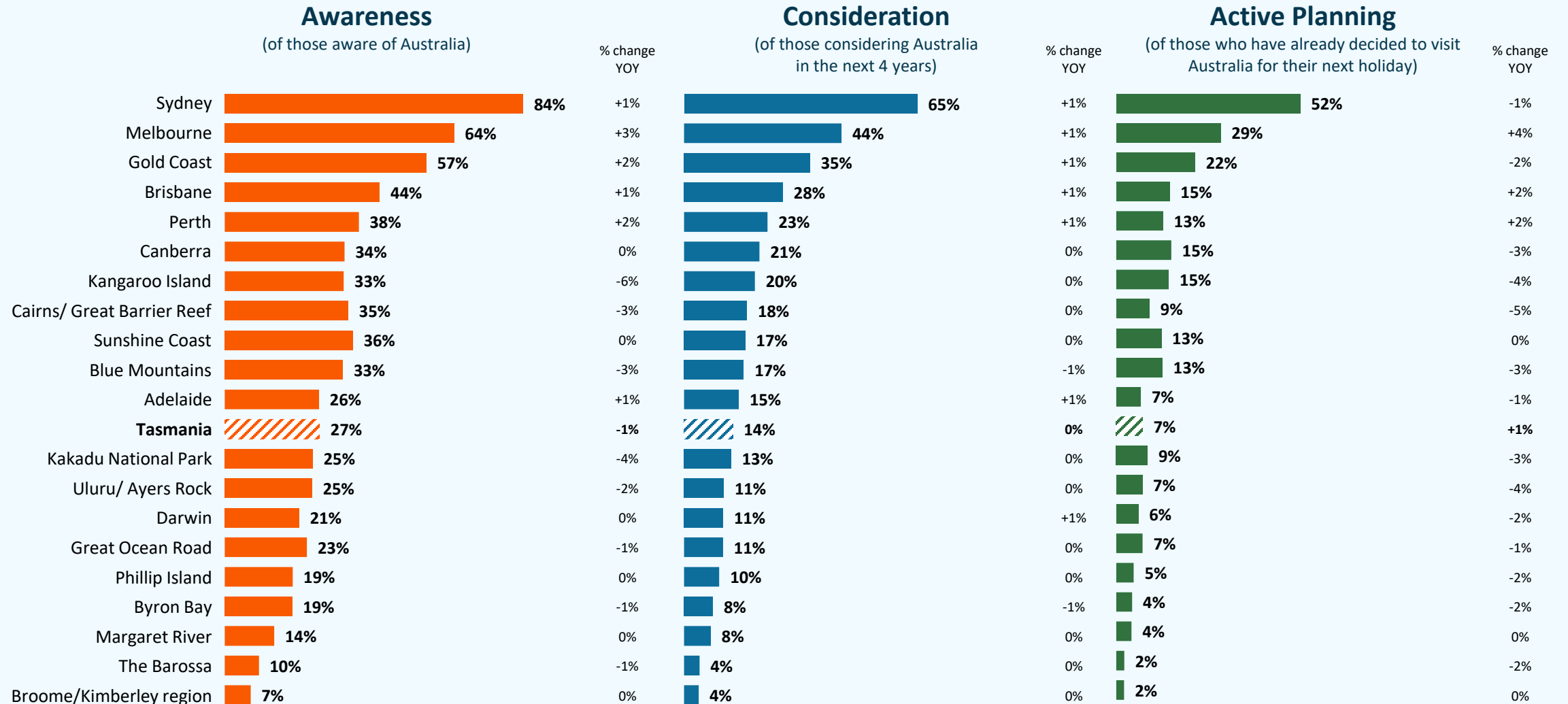


Tasmania's destination equity has remained relatively stable over the last three years

Australian destinations equity among OOR travellers – (over time)

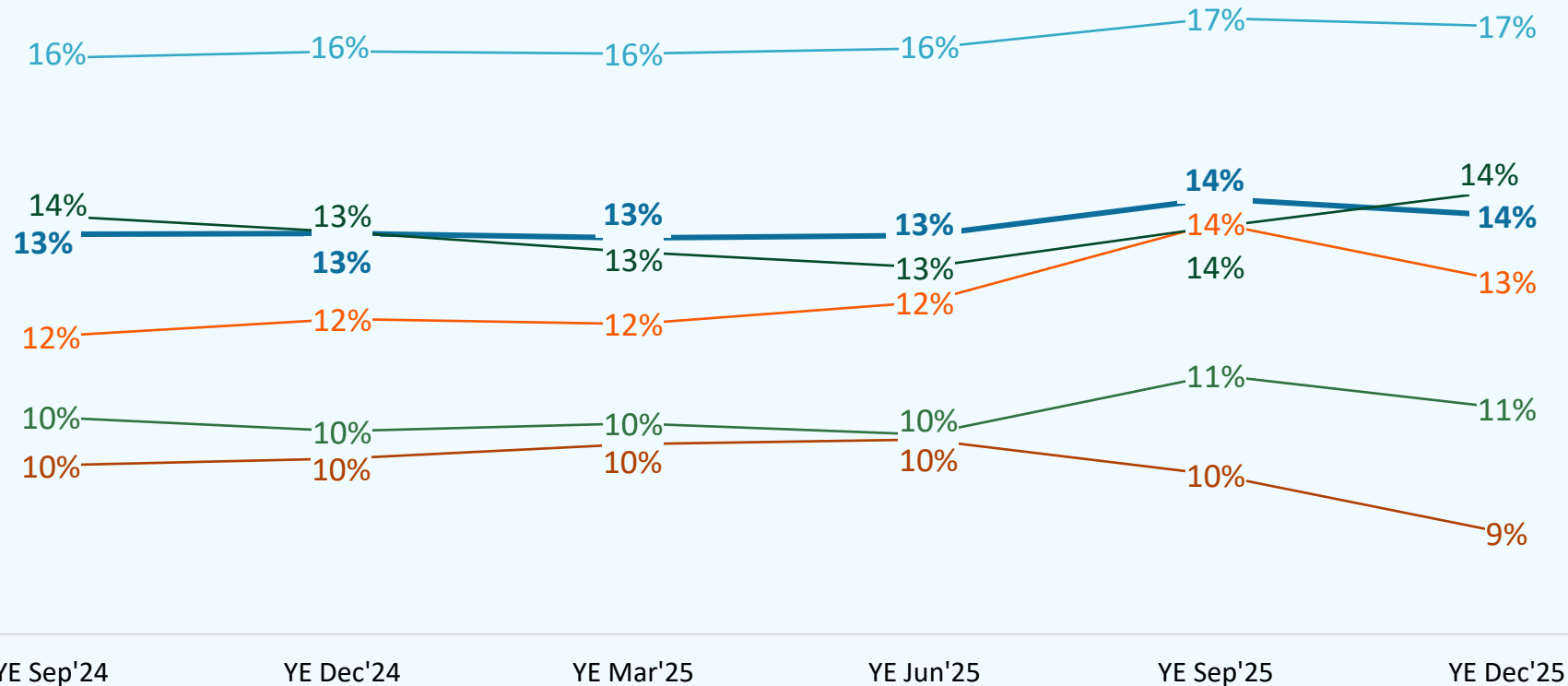


Among OOR travellers, awareness, consideration and active planning for Tasmania destinations have remained stable YoY



Consideration for Tasmania is highest amongst OOR travellers from South/Southeast Asia followed by OOR travellers from North Asia

Consideration of Tasmania destinations NET (among those considering Australia) over time – by source region

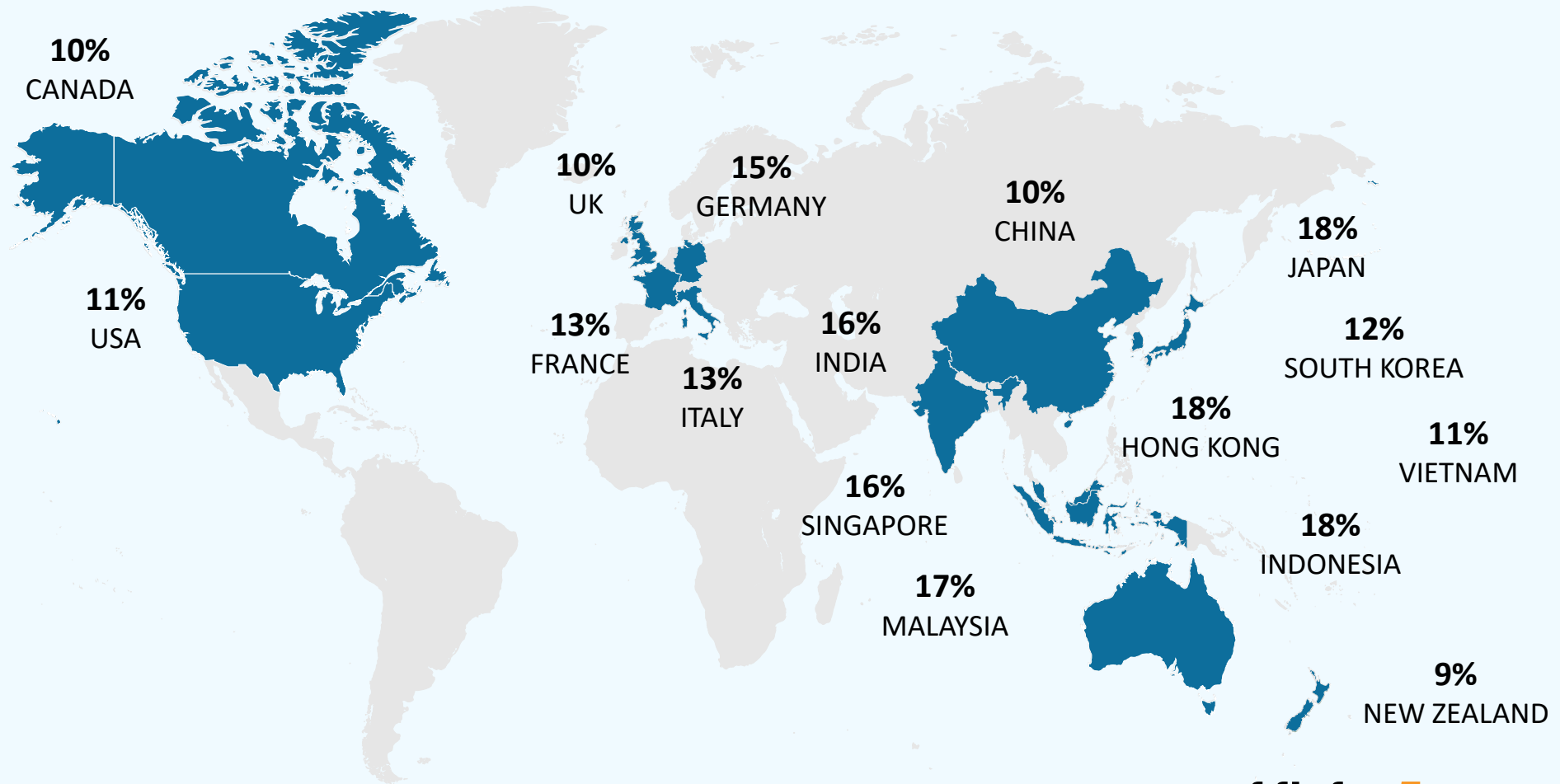


Region	YoY
Global	+0.3%
North America	+0.4%
Uk & Europe	+0.6%
North Asia	+0.7%
South/ Southeast Asia	+0.5%
New Zealand	-1.2%

YoY = latest YE period compared to the same period a year earlier

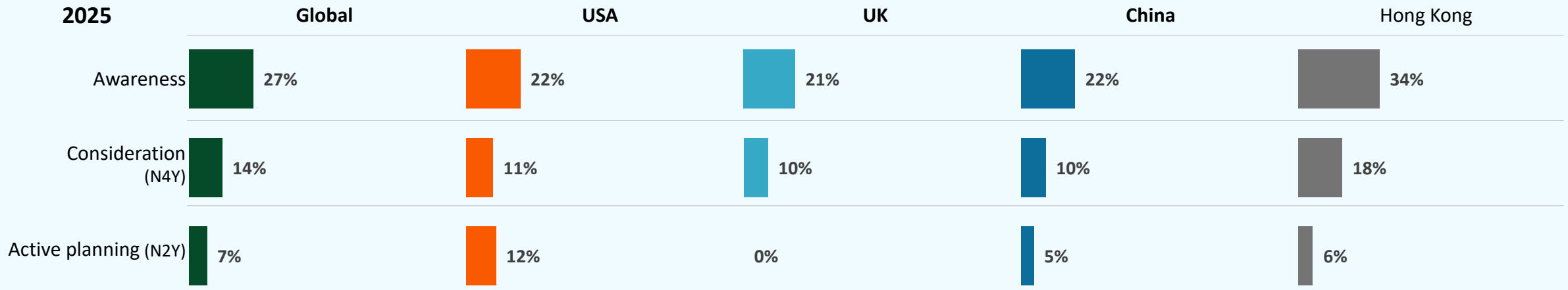
Tasmania's consideration is strongest across Asian markets, in particular Hong Kong, Indonesia and Japan

Tasmania consideration by market (among Australia Considerers) – (Jan-Dec 2025)



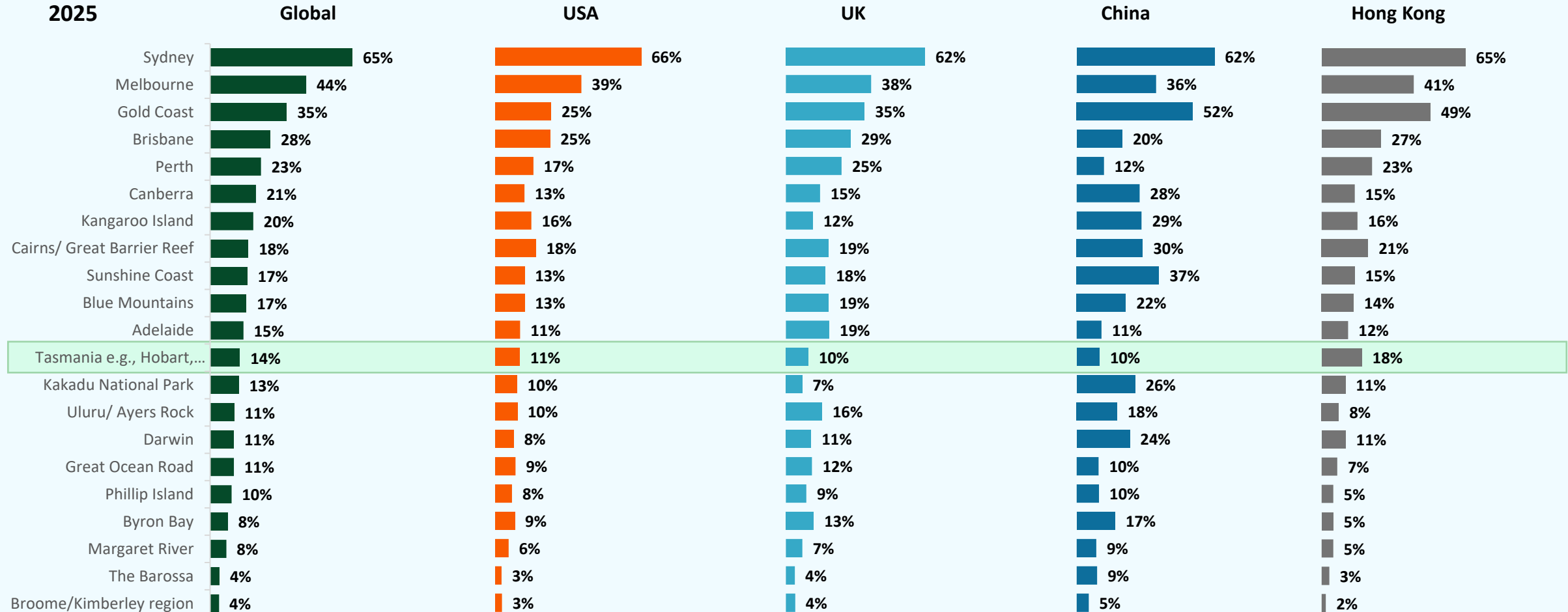
Across our Tier 1 markets, Hong Kong has the highest level of familiarity and consideration, which have also increased over the last year

Tasmania destination equity – (Jan-Dec 2025 verse Jan-Dec 2024) by markets of interest



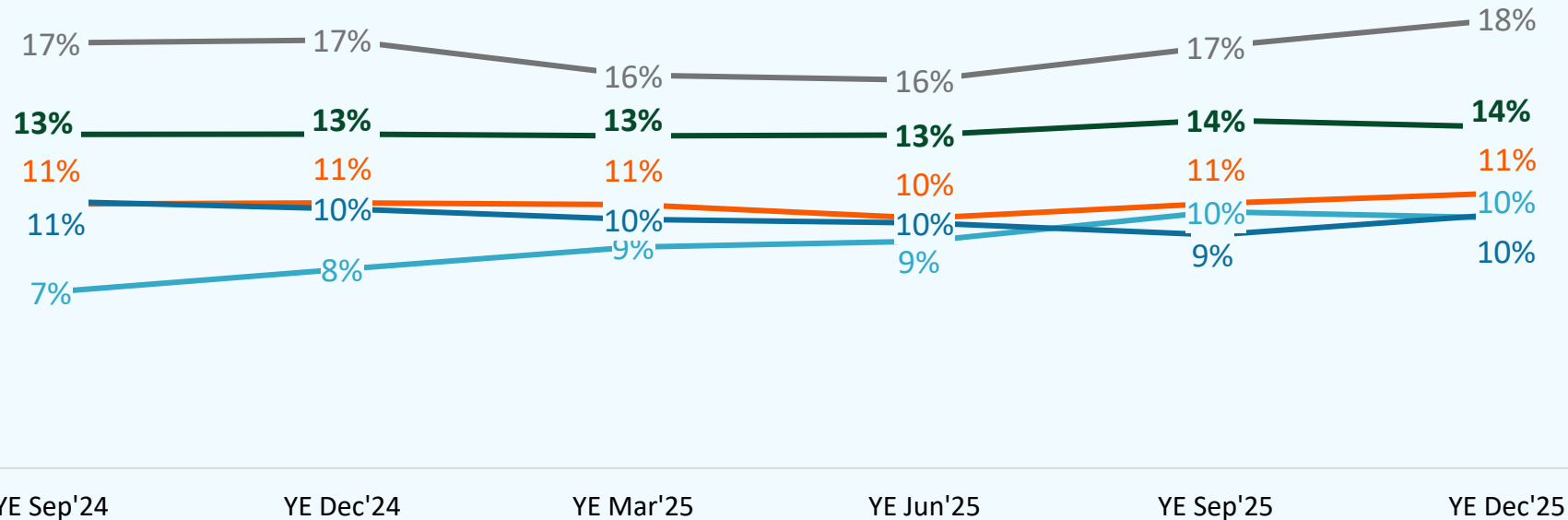
Hong Kong has the highest consideration for TAS, ranking in the top 7 considered destinations

Australian destination consideration – (Jan-Dec 2025) Tier 1 TAS markets



Consideration of Tasmania remains stable across markets of interest, with the UK seeing the biggest relative increase over time

Consideration of Tasmania destinations (among those considering Australia) over time – by markets of interest

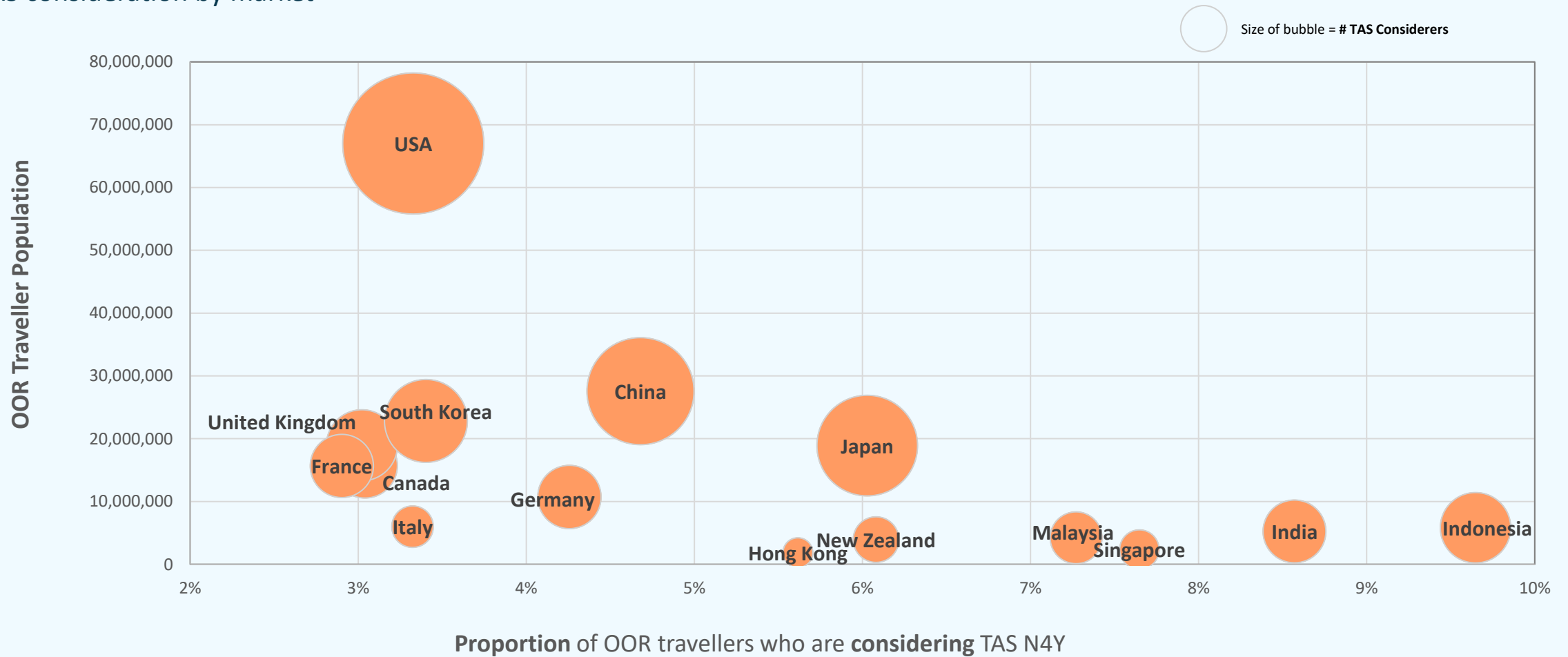


Region	YoY
Global	+0.3%
USA	+0.4%
UK	+2.1%
China	-0.2%
Hong Kong	+0.9%

YoY = latest YE period compared to the same period a year earlier

While the USA is a large target population, consideration is lower than markets like Indonesia and India

TAS consideration by market

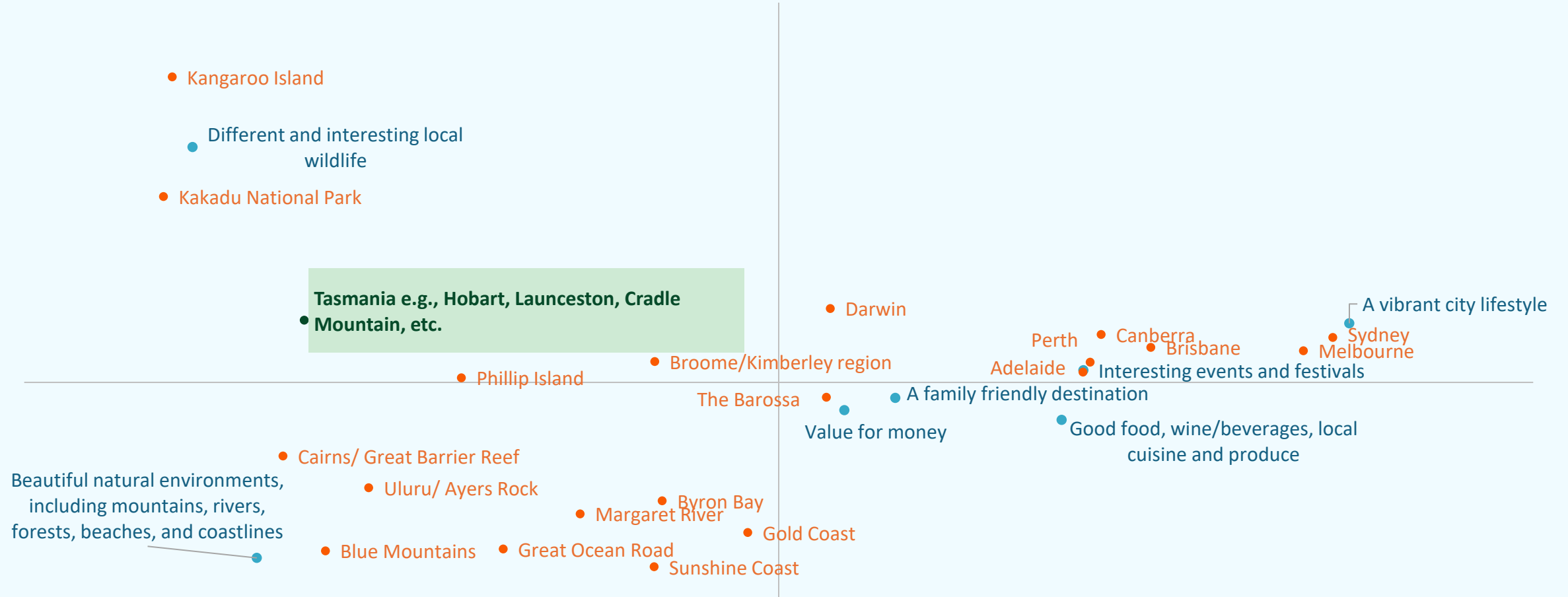


Notes:

1. CDP Market Sizing Jan25 – Sep25
2. B2. Which of the following Australian destinations are you considering travelling to in the next 4 years? YE Dec '25

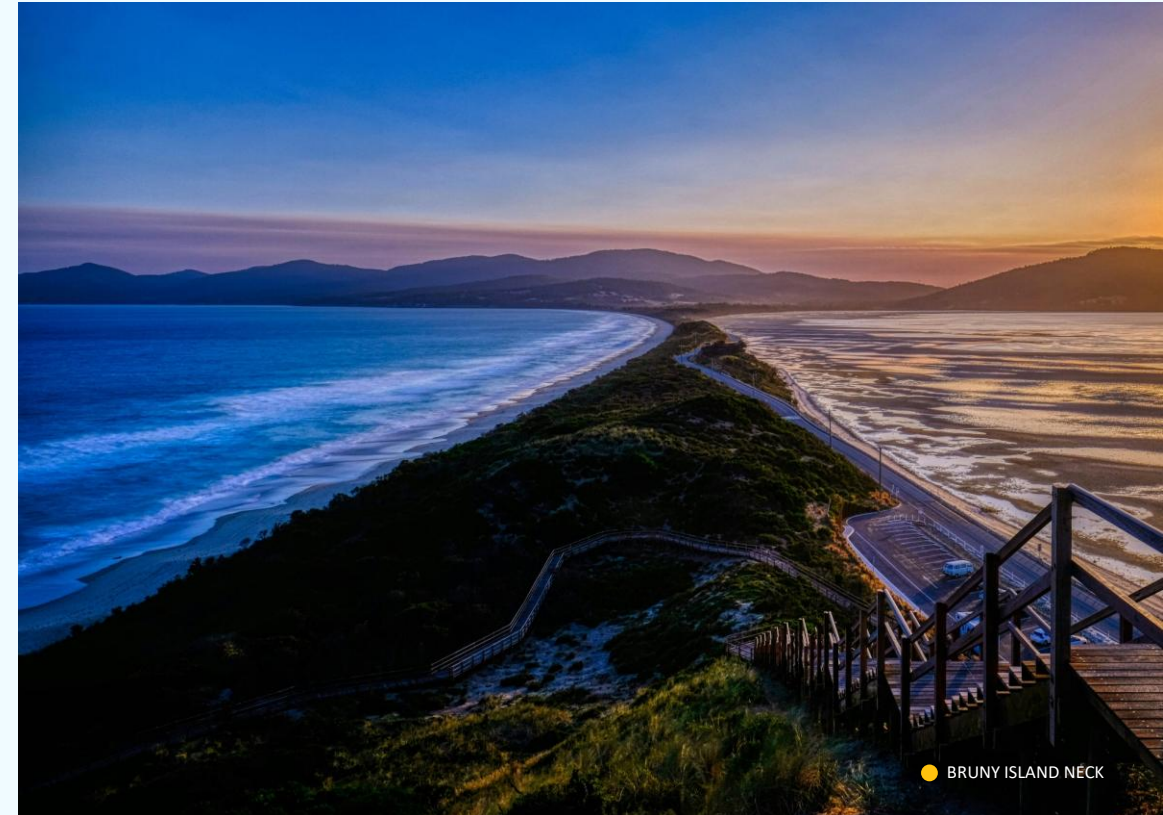
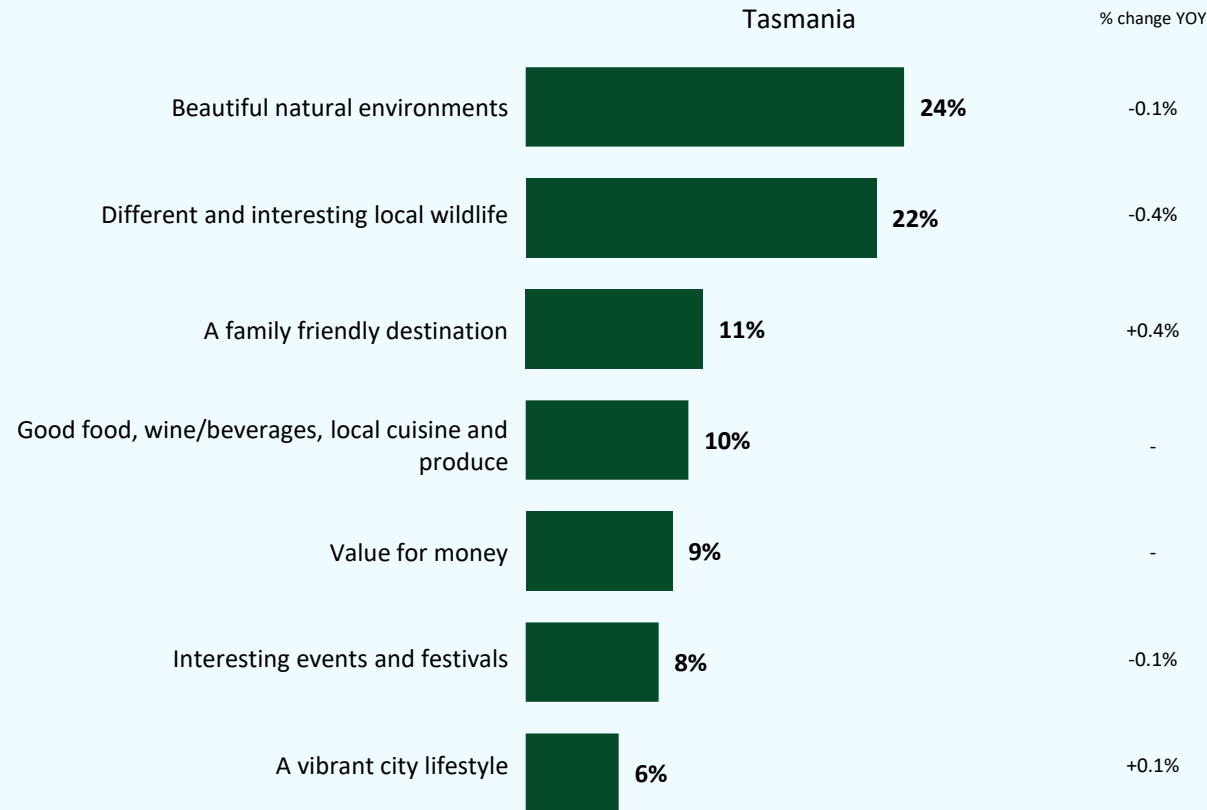
Tasmania sits between different and interesting local wildlife and beautiful national environments

Australian destination associations



Tasmania continues to be known for its beautiful natural environments and access to Australian wildlife, with very little change YoY

Australian destination associations – Tasmania

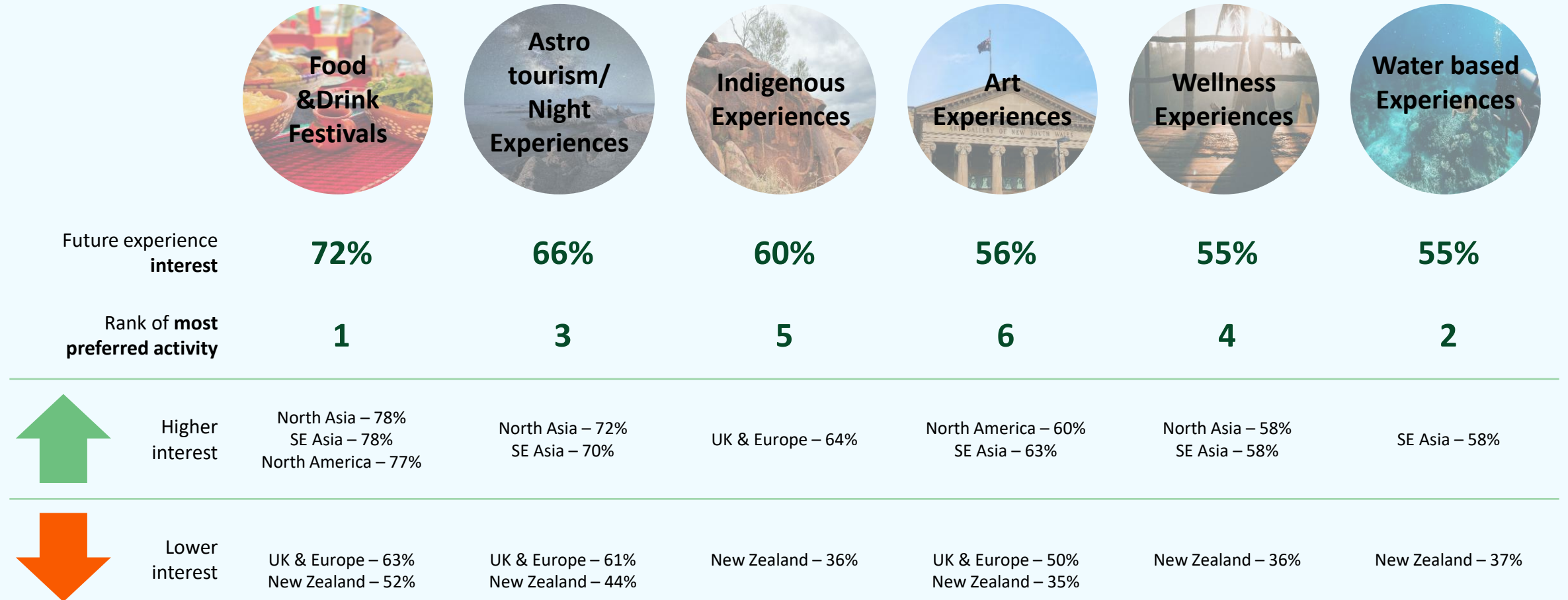


Traveller Experiences



Food and drink festivals rank highest, while water experiences draw low interest but are still the second-most preferred activity


Interest in experiences T2B (I would like to do this & I would love to do this)

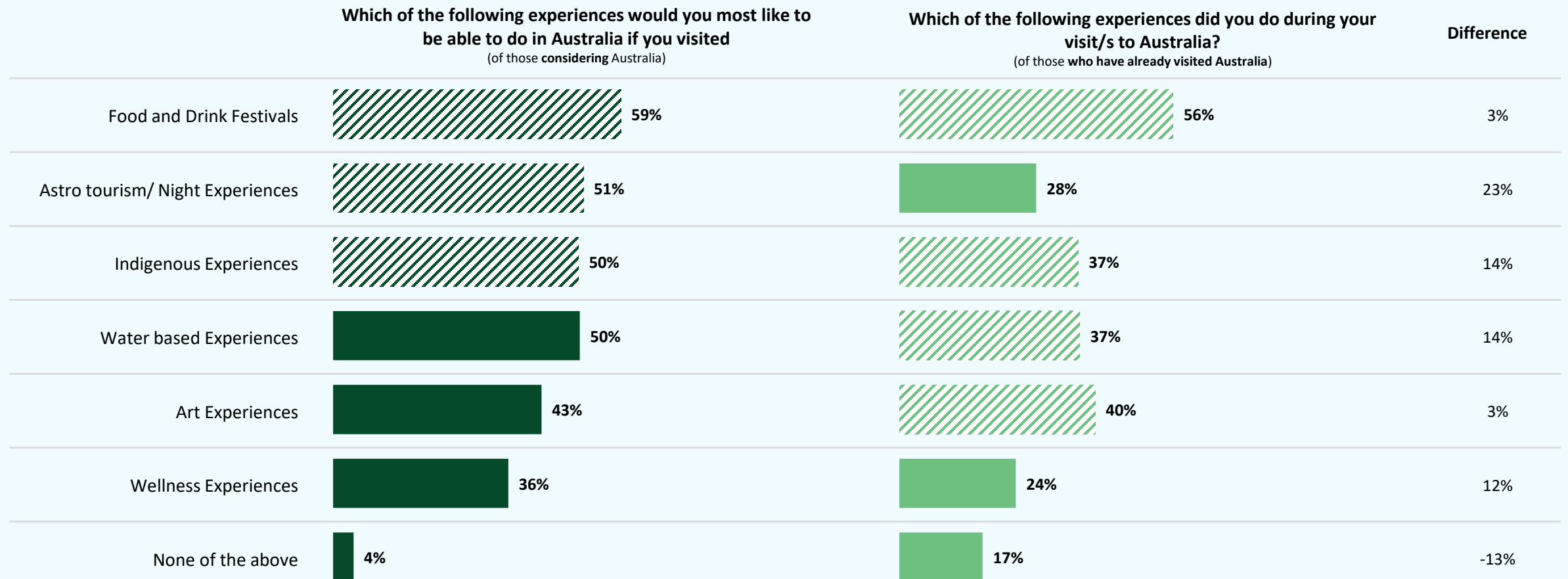




Expectations of experiences OOR travellers would like to do are greater than reality, particularly for Astro tourism/Night experiences

Experience consideration in Australia (Nov 25)

 Indicates the top three for each

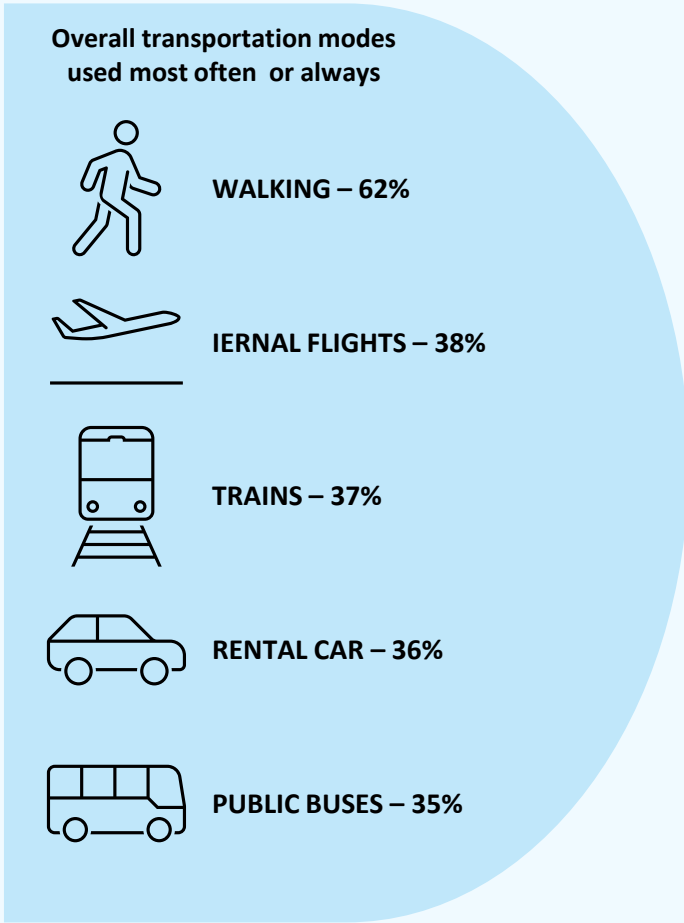


EXP4. You mentioned that you are considering travelling to Australia in the next 4 years, which of the following experiences would you most like to be able to do in Australia if you visited? Base Nov 25 Global excl. Australia & Vietnam, those considering Australia, n=1,081. EXP5. You mentioned that you have decided on Australia for your next planned holiday, which of the following experiences would you most like to be able to do in Australia when you visit? Base Nov 25: Global excl. Australia & Vietnam, those already planning a trip to Australia, n=218. EXP6. You mentioned that you have visited Australia in the past 5 years, which of the following experiences did you do during your visit/s to Australia? Base Nov 25: Global excl. Australia & Vietnam, those already visited Australia P5Y, n=560

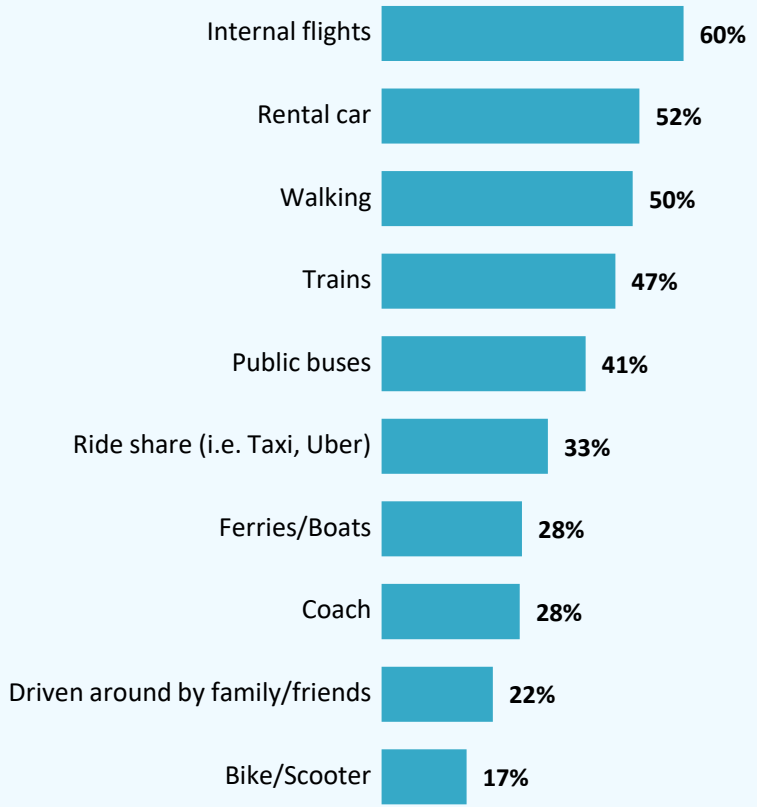
Transportation

Overall walking and internal flights were the most used modes of transportation; while in Australia travellers perceive they would use internal flights and rental cars the most

Transportation used when travelling internationally for leisure– by source region



Perceptions of transportation travellers would used in Australia




	North America	UK & Europe	North Asia	South/Southeast Asia	New Zealand
Internal flights	52%	63%	62%	63%	52%
Rental car	55%	58%	43%	50%	60%
Walking	57%	51%	39%	48%	71%
Trains	43%	47%	42%	47%	59%
Public buses	37%	41%	37%	42%	49%
Ride share (i.e. Taxi, Uber)	44%	25%	29%	36%	40%
Ferries/Boats	29%	29%	22%	28%	39%
Coach	12%	27%	30%	34%	18%
Driven around by family/friends	22%	16%	15%	24%	47%
Bike/Scooter	16%	19%	12%	21%	11%

SD1. Typically, when travelling internationally for leisure, how often do you use each of the following types of transport.
 SD2. Imagine a future holiday in Australia, which of the following modes of transport would you use.
 Base Mar 25: Global (excl Australia) n=4,214, North America n=501, UK & Europe n=1,000, North Asia n=1,212, South/Southeast Asia n=1,201, New Zealand n=300
 Note: Other has been excluded from chart

Two fifths of OOR travellers have chosen a self-drive holiday before, mainly due to convenience/flexibility

Reasons for choosing self-drive holiday (Oct'25)

40%
of OOR travellers have previously chosen a self-drive holiday



Higher among:
Italy 52%
Germany 50%
Malaysia 50%
USA 48%
New Zealand 46%

Reasons self-drive holiday is chosen
(of those who chose a self-drive holiday)



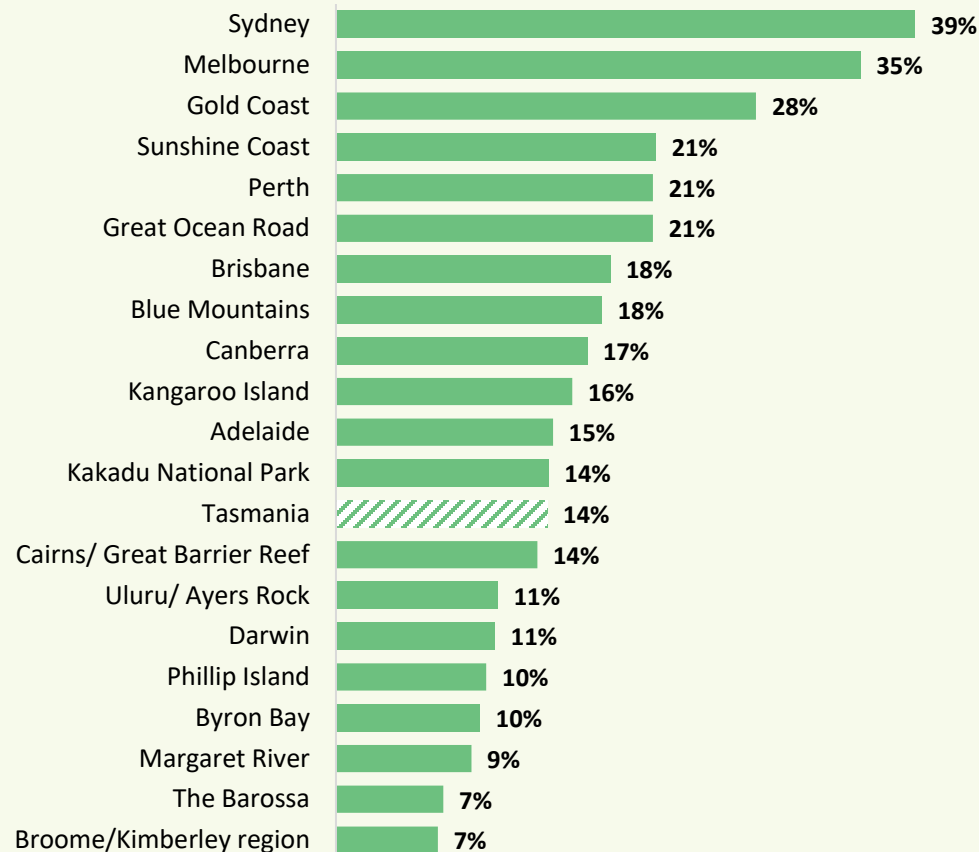
48%
of OOR travellers are likely to chose a self-driving holiday in the **future**



Sydney, Melbourne, and the Gold Coast were viewed as the most appealing self-drive destinations in Australia, with an easy car-rental process

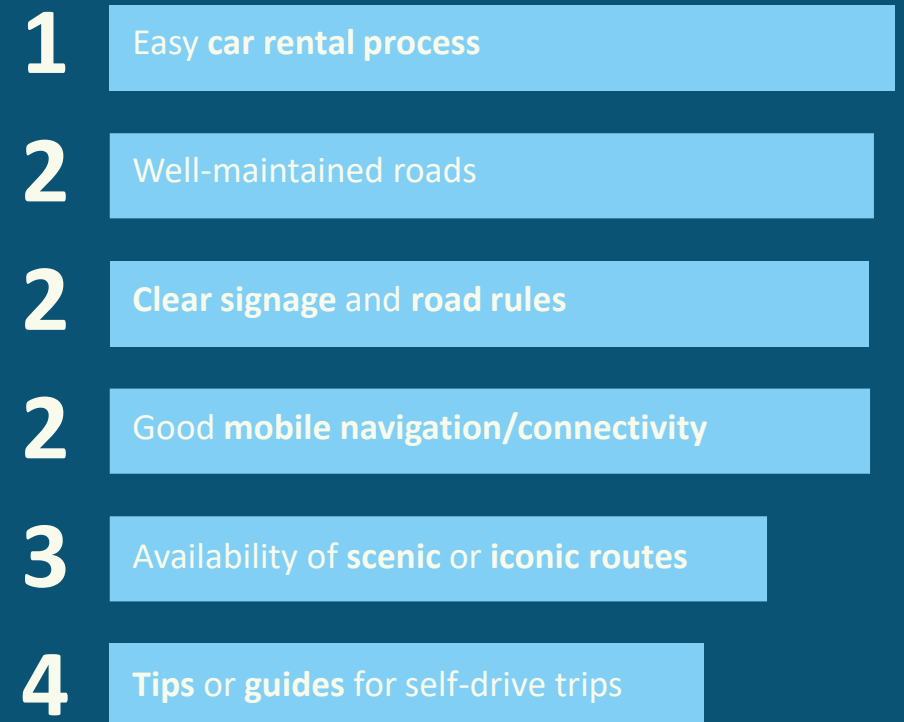
Self-drive appeal in Australia (Oct'25)

Most appealing self-drive experience in Australia
(of those aware of Australia)



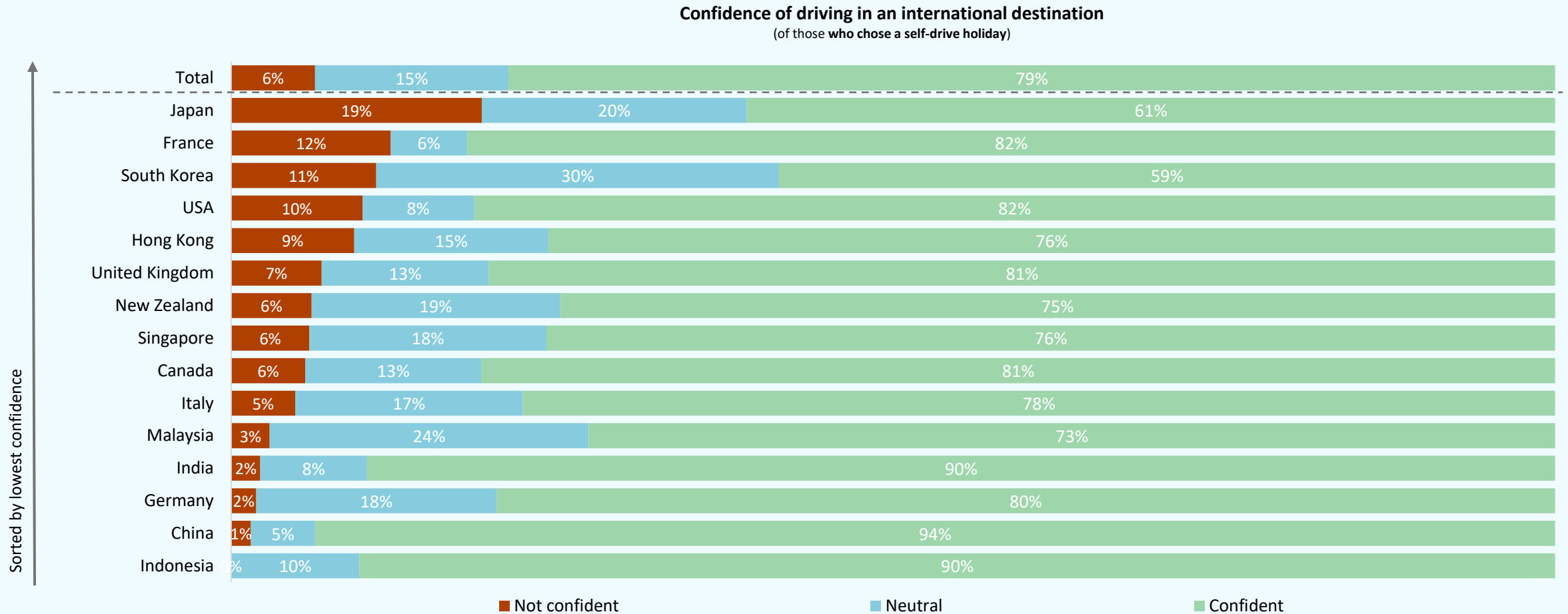
Most appealing self-drive destinations in Australia

Ranking of what would make self-drive in Australia more appealing
(of those who are aware of Australia)



Japanese travellers are least confident about driving overseas, making Australia's 'left side of the road' potentially appealing

Confidence driving at a holiday destination (Oct'25)

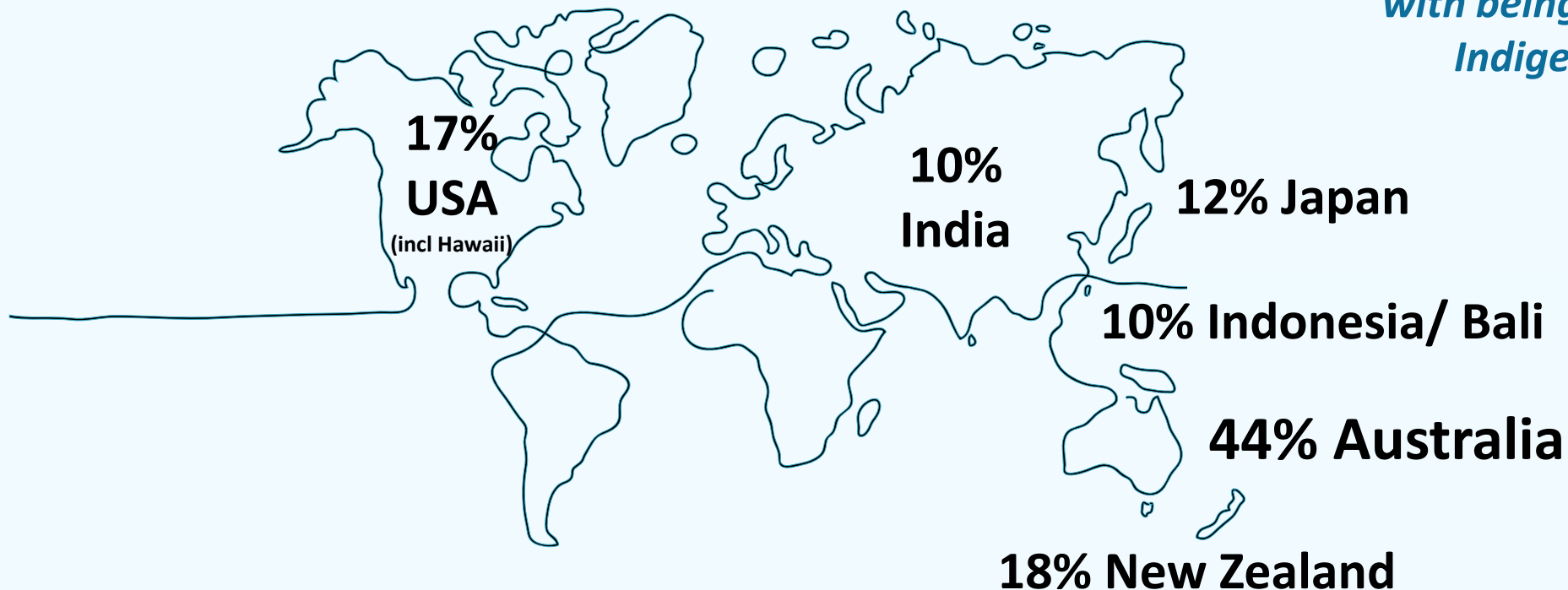


Indigenous Experiences

Australia is the country most associated with being able to experience Indigenous cultures, with NZ and Asian markets higher still

Countries associated with being able to experience indigenous cultures – (top 6 responses)

“Which countries do you associate with being able to experience Indigenous cultures?”



Higher in:
New Zealand – **67%**
North Asia – **51%**
SE Asia – **48%**

Lower (but still #1) in:
UK & Europe – **30%**
North America – **35%**

More can still be done to address misconceptions and increase familiarity with indigenous experiences

Top 5 Barriers to not choosing experiences in Indigenous settings



28%

(-% vs '24)

Worried it might be unsafe



23%

(+1% vs '24)

Afraid it would be more expensive (adds cost)



20%

(+1% vs '24)

I don't understand enough about it



20%

(+1% vs '24)

Not enough time while on vacation/ prefer to prioritise other things



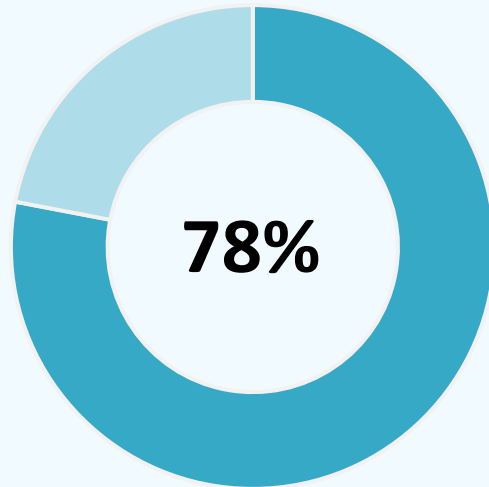
20%

(+1% vs '24)

Afraid I would do or say something to offend

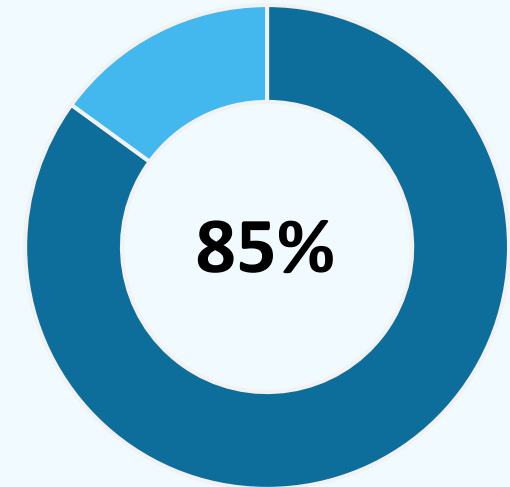
Helping travellers understand more about indigenous experiences increases their interest

Likelihood to engage before being exposed to imagery (likely/very likely/certain %)



Example images shown

Likelihood to engage after being exposed to imagery (likely/very likely/certain %)



Bigger impact observed for:
Singapore, New Zealand, South Korea

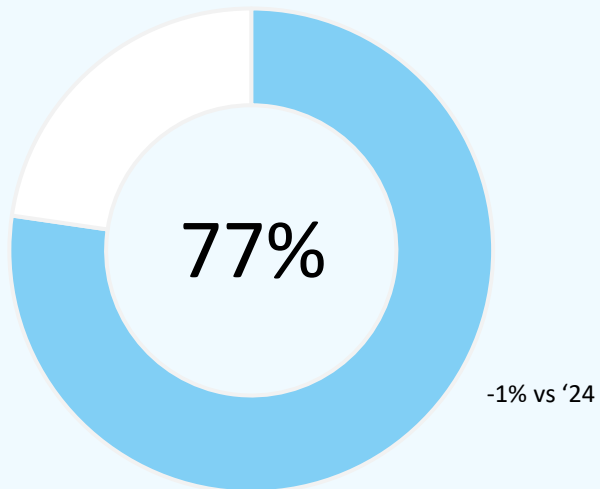
Sustainability

Travellers continue to believe that sustainability is important, and show concern about the impact of travel

Importance of sustainability

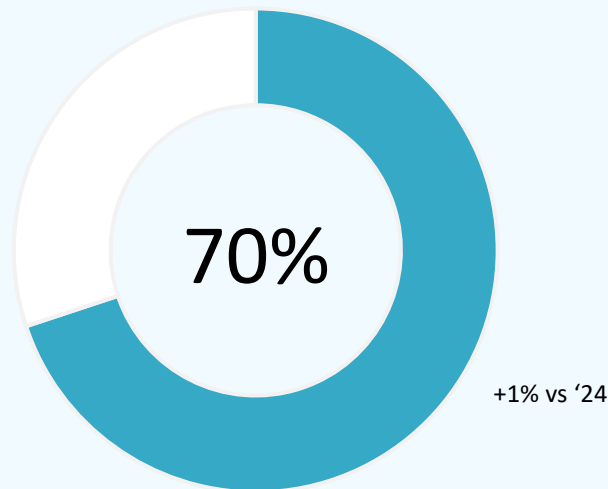
Importance of sustainability overall

(Very important/important %)



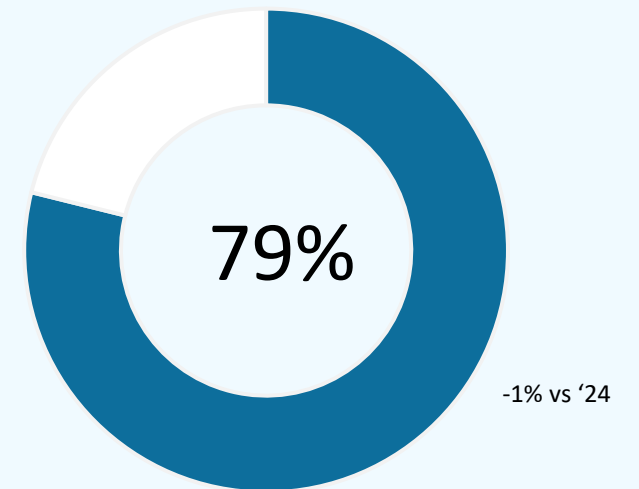
Importance of travelling sustainably on holiday

(Very important/important %)



Concern about environmental impact while travelling

(Extremely/very/somewhat concerned %)



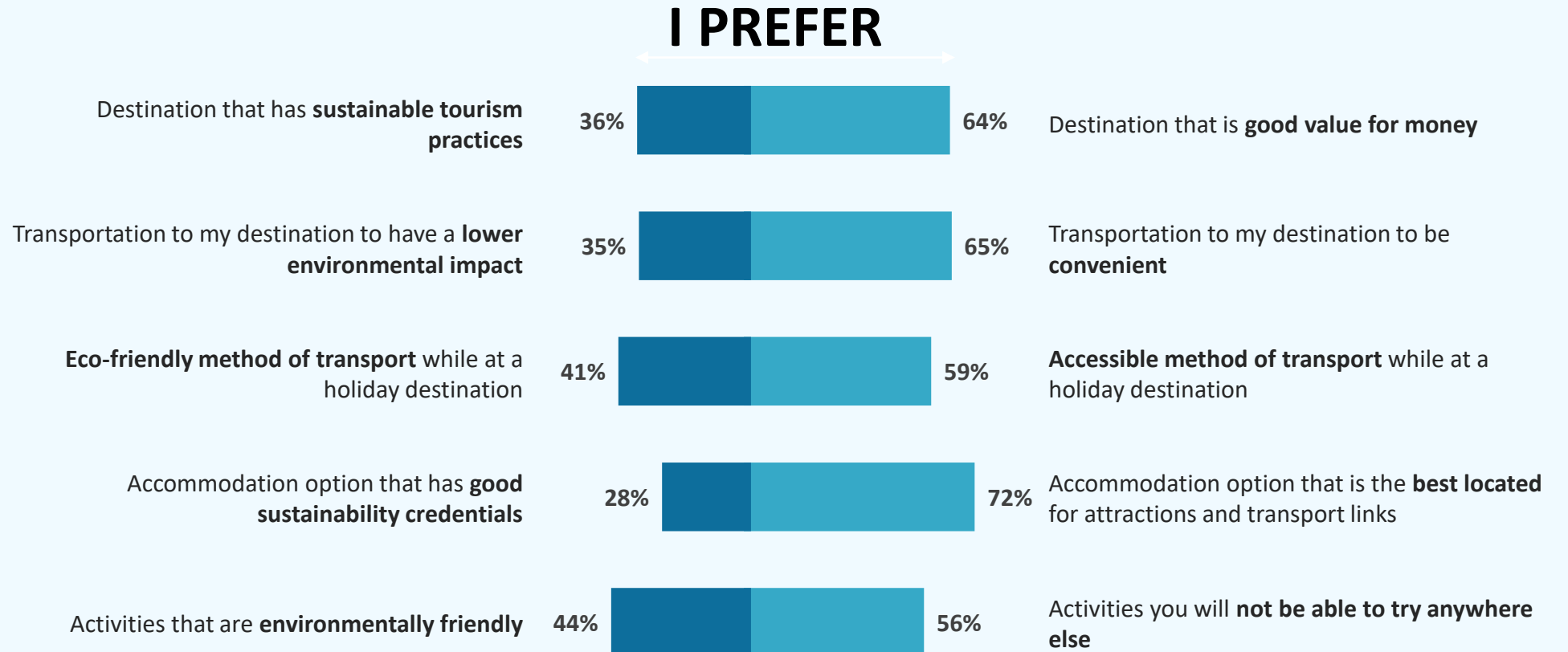
Approximately Two in five travellers claimed to prefer eco friendly methods of transportation and activities, with accommodation most likely to be chosen based on location

Preference for sustainable options



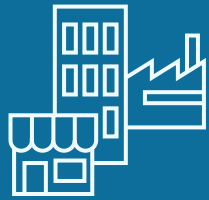
Luxury travellers and Working Holiday Makers were more likely to prefer a number of sustainable/eco-friendly options.

Travellers from China, India and Indonesia had the highest stated preference for sustainable/eco-friendly options.



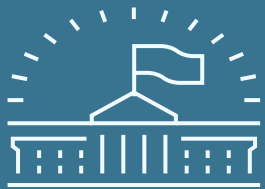
Both the tourism industry and government are expected to drive sustainable tourism, many travellers are willing to pay more for sustainable tourism

Future intention for sustainable travel – net agree



Tourism businesses should be **responsible for finding sustainable solutions** for the tourism industry

77% (+4% vs '24)



It is the **role of governments** to **promote sustainable tourism**

76% (+2% vs '24)



I expect to pay more for sustainable tourism

62% (+1% vs '24)

I am willing to pay more for sustainable tourism

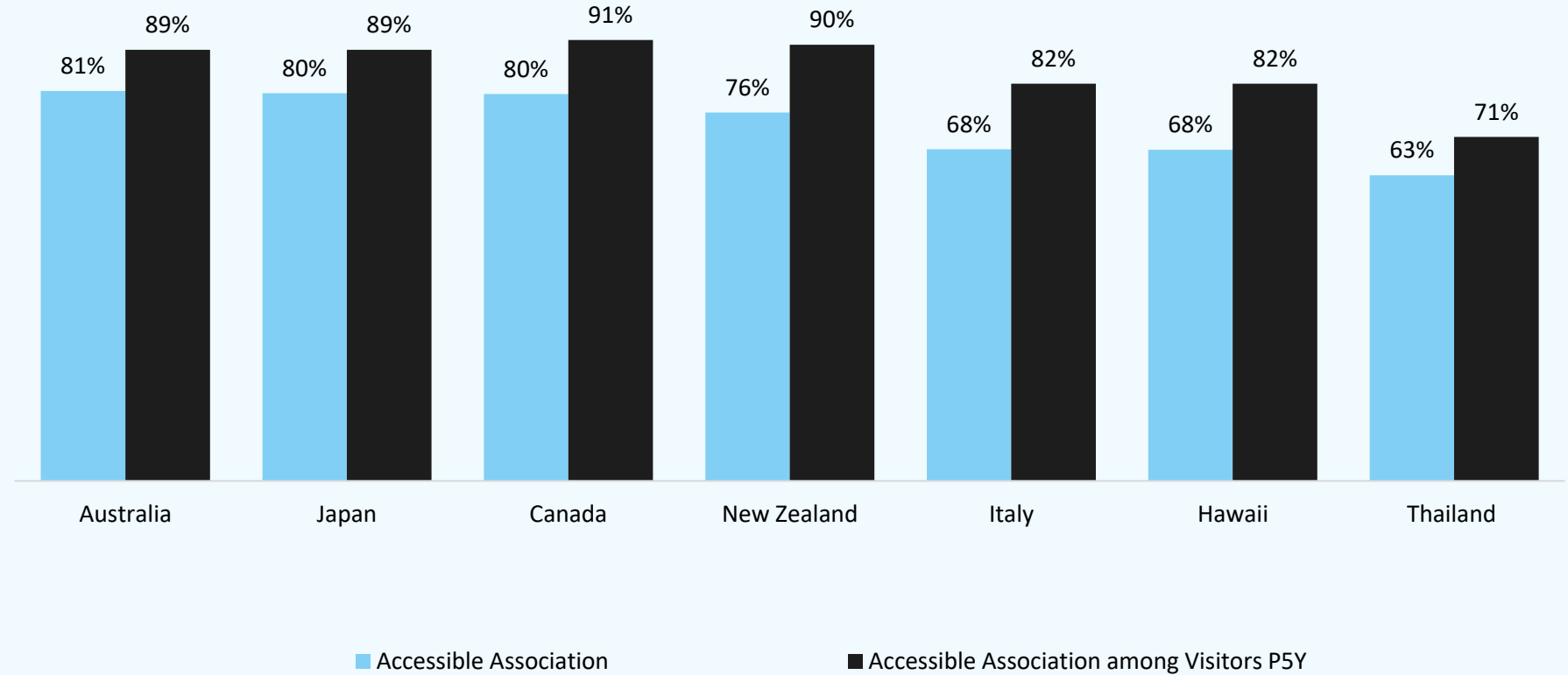
55% (+6% vs '24)

Accessibility

8 in 10 travellers perceive Australia to be accessible, jumping to 9 in 10 among those who have been here

Accessibility perceptions of Australia and key competitors (of those aware of destination)

17% of OOR travellers have accessibility needs when travelling
 (e.g. mobility restrictions, cognitive, hearing impairment/deafness, blindness/low vision, using a pram etc.)



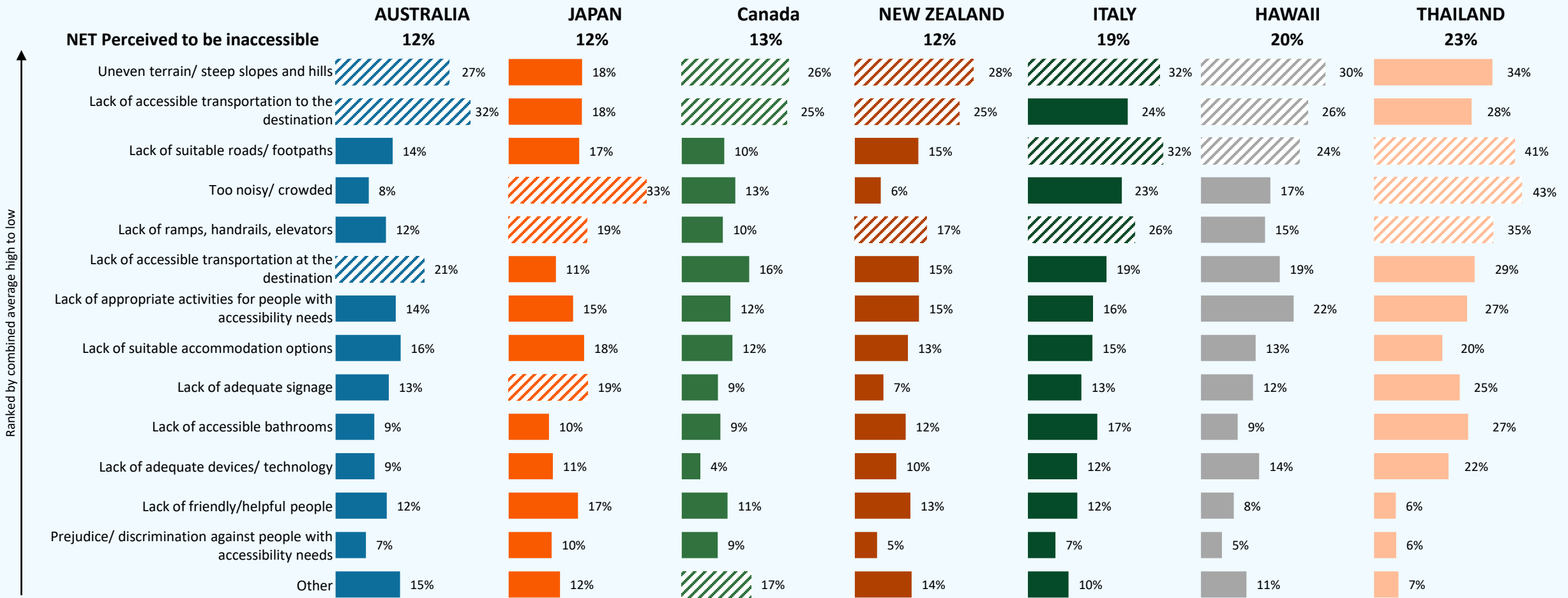
Z0. Which of these accessibility needs do you have travelling?

ACC1. How accessible do you think each of these destinations are for people with different accessibility needs (like using prams, wheelchairs, having low or no vision, hearing impairments, hidden disabilities, or cognitive impairments etc.)?

Base: Jun '25 Those aware of and/or considering the destination – Australia n=2,426, Japan n=2,575, Canada n=1,540, New Zealand n=1,897, Italy n=2,065, Hawaii n=1,846, Thailand n=1,893. Jun '25 Those who have visited the destination in the past 5 years – Australia n=560, Japan n=712, Canada n=234, New Zealand n=254, Italy n=424, Hawaii n=179, Thailand n=483 Jun '24 Those aware of and/or considering the destination – Australia n=2,453, Japan n=2,548, Canada n=1,556, New Zealand n=1,952, Italy n=2,030, Hawaii n=1,881, Thailand n=1,904. Jun '24 Those who have visited the destination in the past 5 years – Australia n=528, Japan n=613, Canada n=236, New Zealand n=270, Italy n=390, Hawaii n=158, Thailand n=457

The top reasons of perceived inaccessibility among those who rated Australia poorly for accessibility, included uneven terrain/steep slopes/hills, a lack of accessible transportation to get here and travel around here

Reasons for perceived inaccessibility (of those aware of destination who perceive it to be inaccessible)



Key insights summary

CDP: key takeaways



Australia's brand equity remains strong and competitive.

Proximity is a key factor that drives consideration for Australia across source markets.



Australia and Tasmania share a key relative strength in Natural Environments, and a differentiator in Wildlife.



Of Tasmania's core Tier 1 markets, Hong Kong has the highest levels of familiarity and consideration, with the USA and China the largest target populations.



Responsible travel enhances Tasmania's appeal when it is clearly linked to authentic experiences, ease of travel and perceived value for effort.



Australia is generally viewed as accessible but uneven terrain and lack of accessible transportation options are concerns for some.

fiftyfive5
Part of Accenture Song



Tourism Australia & Fiftyfive5

TAS

March 2026

● WINEGLASS BAY