Seasonal Experiences Index:

Spring/Summer 2025

BIG RED GROUP The Experience Network.

Contents

Foreword

As the Spring / Summer season of 2024-2025 comes to a close, it's clear that Australia's tourism and experiences industry continues to go from strength to strength.

In the five years since the pandemic reshaped the way we travel and explore, operators across the nation have shown resilience, innovation, and a deep commitment to delivering the unforgettable experiences Australia is known and loved for - and it's starting to pay dividends.

This report takes a deep dive into the season that was - analysing the 650,000+ experiences served to identify standout trends, challenges, and successes that shaped our industry over these warmer months. From surging demand in outdoor adventures to the rise of immersive cultural and wellness experiences, the past season has once again reinforced just how integral experience providers are to Australia's economic fabric.

At Big Red Group, we remain dedicated to championing the experience economy and sharing insights that help our industry to thrive. We hope you find this report both informative and inspiring, and we look forward to bringing you even more insights later in the year. Enjoy the read!

David Anderson
CEO & Co-Founder, Big Red Group

State of the nation's tourism and experience industry

The tourism and experiences industry has faced a challenging few years, shaped by the lasting impacts of the pandemic, global economic pressures, and shifting consumer behaviors. While many operators have had to navigate uncertainty, one thing remains clear: appetite from domestic and international travellers to experience Australia has returned.

How are visitor numbers looking?

Tourism Research Australia's Tourism Forecasts for Australia 2024-2029 report presents an optimistic outlook, with international visitor numbers projected to fully recover to pre-pandemic levels by 2026. Domestic tourism meanwhile, is expected to pick up in the main from next year too, with visitor spend, which already exceeds its pre-pandemic level, set to continue rising.

An uptake in both is extremely promising - particularly as regional and rural tourism continues to be impacted by an uncertain aviation industry, whilst changing market dynamics continue to foster an air of cautious recovery for the industry. The road to recovery may have been a long and winding one, but there appears to be light at the end of the tunnel.

$164.5B
2022 - 2023

$194.5B
2023 - 2024
+8.2%

How is visitor spending looking

Tourism Research Australia's latest National Satellite Account found that total tourism consumption in Australia climbed to $198.5 billion last financial year, an increase of 8.2% from 2022-23. It's possible this growth may be attributed to strong demand for inbound tourism from key markets like Europe and the USA - as well as neighboring regions, with strong visitorship also seen from Asia-Pacific in 2024.

Macroeconomics in recent years has meant Australians have had to remain resilient, with cost-of-living and high inflation rates leading to belt-tightening across the board. CommBank iQ's Cost of Living Insights Report for November 2024 however, showed financial burdens are easing slightly with discretionary spending up by 1.3%.

Encouragingly it appears that consumers' intent to spend within the Travel or Leisure categories is steadily increasing, up by +22% and +13% respectively - and it's a trend reflected by our consumer brands RedBalloon and Adrenaline, with both seeing average order value (AOV) increase this season.

While this is ultimately positive news for the experiences industry - with further positive impact to land in 2025 - Big Red Group data has also shown that consumers continue to be mindful of their purchasing decisions, continuing to adopt a 'quality over quantity' mindset that has seen overall booking volumes dip slightly from 2024.

What does this mean for the experience industry?

Changes in spending habits are a positive sign for tourism and experience operators who have undoubtedly been dealt a rough hand over the past five years - with many of them cost indexing to offset rising operational expenses or inflation and keep their businesses afloat.

Favorable financial forecasts for 2025 offer thousands of small or family-owned businesses, who are the lifeblood of the Australian tourism industry, the chance to recover and get back to doing what they do best - sharing stories through lived experiences.

With Skyscanner's latest Horizons Report finding that 43% of Australians are looking to travel more in 2025 - and new ABS data finding Australian tourism jobs have exceeded pre-pandemic levels for the first time in 12 months, there does seem to be a sense of recovery in the air - and we're ready and raring to support operators to help get there.

$7.5M
International visitors (up 22%, year to Sept 2024)

$114.5M
Domestic overnight trips (up 3%, year to Sept 2024)

Great Barrier Reef Cruise, Snorkel and Dive, Cairns

Experience hotlist from Spring 2024

With longer days and warmer weather, in addition to typically quieter crowds and a surge in travel deals, Spring remains an ever-popular season for domestic travel in Australia - particularly for families looking to make the best of the school holidays.

From an operator's perspective, Spring also presents strong opportunities to attract 'shoulder season' visitors and ensure experiences are performing well ahead of the peak summer months (or make necessary changes if they aren't).

With research from the Tourism & Transport Forum (TTF) finding that 71% of Australians enjoyed a well-earned getaway in September and October, there's been consistent growth in numbers across a range of categories - with some of the fastest-growing including:

+124.9%
White Water Rafting

+675%
Sightseeing Tour Getaways

+189.2%
Ecological & Agricultural Attractions

Of course, weather can often make or break a season - and Spring certainly delivered upon early promises of a 'hot and wet' season, with the Bureau of Meteorology declaring Australia's warmest Spring since 1910, with rainfall estimated to be +28% above average across the nation.

Whilst the rain didn't dampen any spirits, as ever, the weather does ultimately dictate the season's experience hotlist - with warmer weather activities claiming the top spots.

Best selling categories in Spring 2024 by booking volume, compared to the previous year:

01. Theme Parks
02. Reef & Island Cruises
03. Whale and Dolphin Watching
04. Scenic Cruises
05. Eating Out
06. Zoos
07. Dining Cruises
08. Wine & Spirit Tasting
09. Picnics
10. Spas

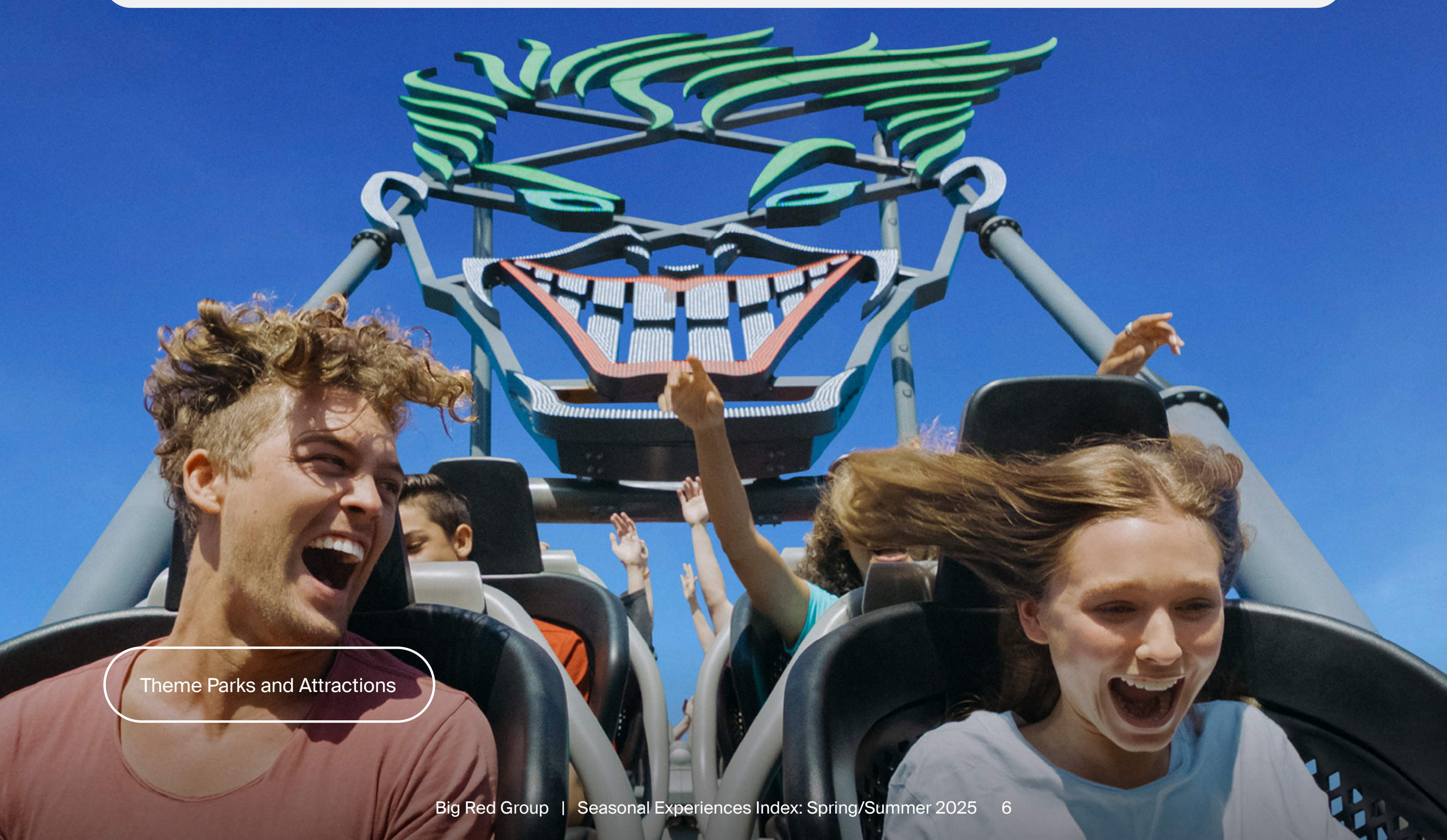
Theme Parks continued to hold onto its reign as the top-selling category among domestic and international visitors, however, the season saw a new entrant to the list in the guise of Whale and Dolphin Watching (**+18%**) - as demand for Animal Experiences more broadly continues to steadily grow (**+5.7%**).

This will be welcome news for NSW experience operators in particular, who faced a slower start to the viewing season as extreme weather impacted migration patterns through Autumn/Winter.

OPERATOR SPOTLIGHT

Bikash Randhawa, Chief Operating Officer at Village Roadshow Theme Parks which operates Warner Bros. Movie World, Sea World and Wet 'N' Wild in Oxenford, Queensland said:

> "Our theme parks and the Gold Coast's stunning beaches are the primary drivers of visitation to the city, and this is a responsibility we take very seriously. We are committed to providing world-class experiences for the city through our theme parks and attractions and providing a fun and safe environment for our guests. The attraction of our theme parks is the wide breadth of our offerings, with something for families of all sizes, demographics, and age groups to experience across our five properties."



Deep-dive into Spring 2024's hottest experiences

As Australia shook off the last of the winter chills, Spring brought with it fresh enthusiasm and opportunities for the tourism and experiences industry.

The warmer weather saw travellers dive head first (literally, in some cases) into a diverse range of experiences - from country escapes to wildlife encounters - and just one glance at the season's fastest-growing experiences highlights how Australia truly can offer something for everyone.

Such variety can often make it hard to pinpoint trends, but here are three that stood out in Spring 2024 and captured the attention of domestic travellers across the country:

Long vacays become short stays

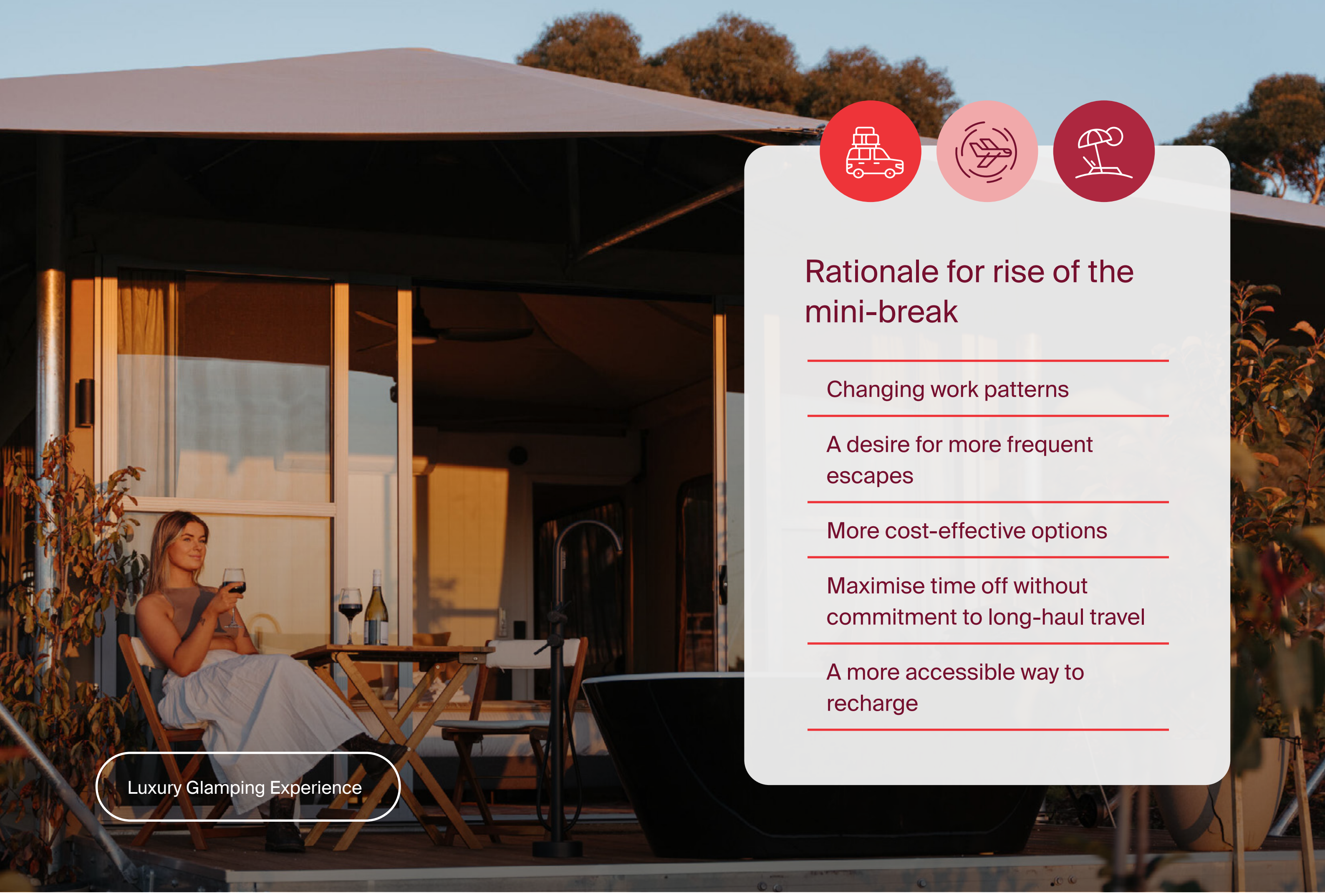
The days of 'fly and flop' may well be behind us, as domestic travellers increasingly opt for short-term getaways over extended vacations.

Data from the Tourism & Transport Forum's Spring Travel Survey found that two-thirds of Australians planned to take a getaway for 1-7 days in Spring, while only **9%** planned a trip longer than two weeks - and it's reflected in the bookings we're seeing across the Getaways category.

Country Getaways grew by **53%** in Spring - and spiked further in Summer, with experiences served surging by **86.9%**. Coastal and Beach Getaways meanwhile, also grew by **55%** in the latter months of Spring.

And in terms of the season's favourite hotspots? Victoria, New South Wales and Queensland saw soaring demand for short-stay experiences - with Mornington Peninsula, Melbourne, Sydney, Hunter Valley, Gold Coast and Gippsland in particular experiencing strong results across the season.

The good news for operators is that mini breaks show no signs of slowing down any time soon. Findings from a recent survey from Carnival Cruises has shown that nearly two-thirds (62%) of Australians are planning at least one short trip in 2025. Long live the short stay!


Luxury Glamping Experience

Rationale for rise of the mini-break

- Changing work patterns
- A desire for more frequent escapes
- More cost-effective options
- Maximise time off without commitment to long-haul travel
- A more accessible way to recharge

OPERATOR SPOTLIGHT

Sherelle Fyfe, Partnerships & Promotions Manager, at The Keith Motel, which operates a two-night Getaway inc. breakfast & Hot Springs in Tootgarook, Victoria, through RedBalloon, said:

“With beach getaways on the rise, The Keith Motel had a busy and successful spring and summer seasons. Guests flocked to the Mornington Peninsula to enjoy a refreshing mini break, with locals and visitors alike seeking a relaxing escape in the heart of the Summer season. Demand remained high throughout the season, as guests sought a peaceful and comfortable getaway to unwind and recharge.”

Culture calls: Aussies embrace the arts

We’ve seen a shift toward cultural exhibitions and other arts and crafts activities this season, as domestic travellers prioritise more experiential activities over traditional sightseeing ventures.

Fuelled by a desire to engage and immerse in more meaningful ways, Big Red Group data has revealed that bookings for Art Gallery & Museum experiences were up by **+30.1%** year-on-year in Spring. This aligns with an influx of exhibitions hitting Australian shores, such as ‘Cao Fei: My City is Yours’ or the world premiere of Yayoi Kusama’s retrospective at the National Gallery of Victoria.

While new cultural experiences, coupled with continued popularity of immersive experiences - such as The LUME’s Van Gogh exhibition - continue to drive visitors and help to establish cultural hubs throughout Australia, the desire for outlets that offer opportunities to express and decompress has further manifested at a grassroots level too.

In fact, the Art & Crafts Classes category, inclusive of experiences like paint & sip classes, pottery workshops, candle making and other artisanal crafts, has more than doubled in size year-on-year, by

+101.4%

With a report from Grand View Research valuing the global art tourism market at $70.4bn AUD ($44bn USD) in 2023 and projecting growth of 3.1% from 2024 to 2030, it’s highly likely this trend will continue to develop and evolve in Australia - and it’s one we’ll be continuing to watch closely.

Revved up:
Bathurst 1000 drives V8 Supercars boom

The lead-up and duration of the 2024 Bathurst 1000 saw a significant increase in V8-related purchases - with bookings climbing by **almost a third (32%)** year-on-year. This surge in interest was directly linked to the excitement and anticipation surrounding the iconic race, which remains one of the most celebrated motorsport events in Australia.

The spike in enthusiasm wasn’t just limited to race weekend, however. The trend was particularly evident in the months of November and December as momentum from Bathurst carried over, with operators sustaining strong sales growth in the category.

The data highlights the **power of major sporting events in driving consumer behavior** - something we’ve explored more broadly in our ‘emerging trends’ section of the report - with Bathurst proving to be a catalyst for increased engagement and spending in the V8 category.

The combination of live racing, media coverage, and fan enthusiasm created a ripple effect that extended beyond the event itself, reinforcing the strong market appeal of motorsports-related products and experiences across Australia.

Mount Panorama V8 Race Car

OPERATOR SPOTLIGHT

Greg Evans, Managing Director at Fastrack Experiences, which operates the Bathurst V8 Racecar drive in Bathurst, through RedBalloon and Adrenaline, said:

> Henry Ford famously said…”Auto racing began 5 minutes after the second car was built”, so people have always enjoyed the challenge of high-performance driving, for its adrenaline-charged excitement, worldwide. We always enjoy a peak in V8 Racecar driving and hot laps experiences before and after the Bathurst 1000 - once motorsport fans and driving enthusiasts realise that you can actually drive on the world-famous Mount Panorama Racing Circuit, they book in to tick off their bucket list experience. In 2024, our two-day event was sold out 6 weeks prior leading to major sales increases for Bathurst and other championship venues during that time.

How the inbound rebound is shaping up this season

With Tourism Research Australia's latest International Visitor Survey (ending September 2024) revealing that international trips to Australia sits at 86% of 2019 levels, whilst spend is 5% up - it's clear that the industry is finally getting back on its feet.

In further good news, it's been a strong season for experience bookings from international markets, with fresh data for the Spring/Summer season pointing to an impressive **+84% surge in bookings year-on-year.**

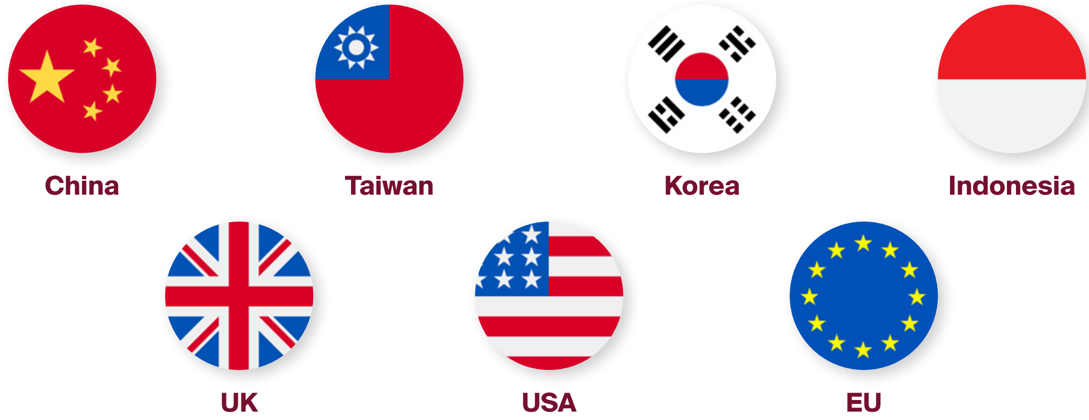
And while the year is still young, 2025 is already shaping up to be a strong one for inbound tourism, with bookings up by almost two thirds **(+64%)** vs. the same period in 2024.

It's taken a good half-decade to get here, but these remarkable increases highlight the industry's accelerating rate of recovery - and strengthen the belief that operators will soon be able to focus on growing their businesses instead of rebuilding them.

+84%
GROWTH
Spring/Summer 2025 vs. Spring/Summer 2024

+64%
GROWTH
1 January 2025 - 28 February 2025 vs. same period in 2024

Strongest demand from international markets this season



Exceeding expectations

One of the standout performers in the inbound tourism landscape this season is China, which has - at long last - demonstrated a strong rebound in experience bookings.

While a weaker economy and ongoing pandemic impact have left Australia's second-largest visitation market slower to return to 2019 numbers, Big Red Group data has shown a pattern of consistent growth, picking up halfway through 2024 and accelerating heavily at the close of the year and into 2025.

Such strong momentum has been particularly noteworthy, as many of Big Red Group's long-standing and new inbound agent partners in China are performing well - signalling that we may well be on the road to full recovery.

Established (and new) players contributing to growth

In addition to **China**, **Taiwan** and **Korea** have emerged as top performers for the experiences industry this season. Both have shown continued interest and strong engagement with Australian experiences, contributing significantly to the growth we're seeing in international bookings.

With bookings from South East Asia also on the uptick, **Indonesia** in particular has shown positive signs of growth, whilst more consistent performers - such as the **UK**, **Europe**, and the **USA** - and growth markets like the **Middle East** have also delivered strong results.

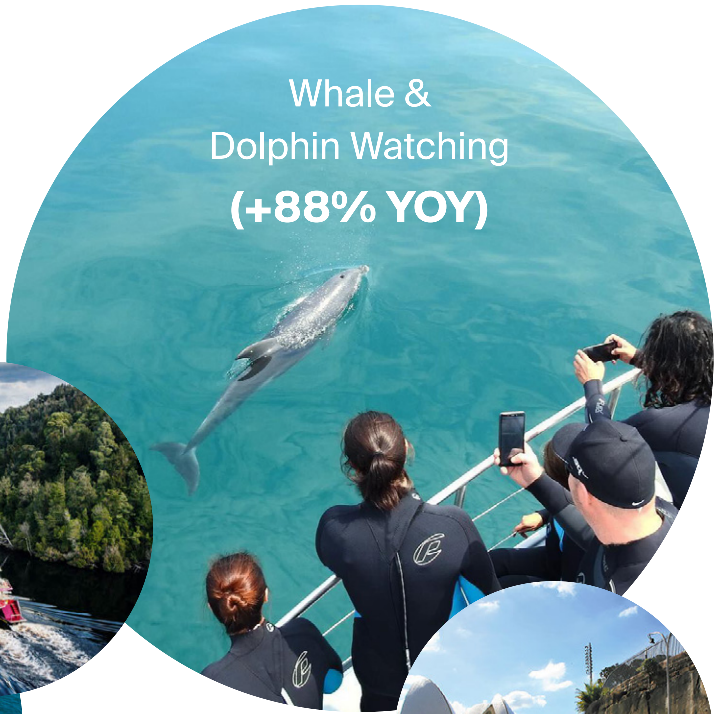
Slower returns

While many international markets have performed well this season, two are proving slower to grow - namely, **India** and **Japan**.

India has been highly anticipated to become a key tourism player for Australia in the post-Covid era, and as Tourism Australia insights have shown, the country ranks fifth for arrivals and expenditure in Australia. However, with seasonal booking data continuing to show a lack of engagement from the Indian tourism market - it's an indication that these travellers could either be leaning into package trips or are waiting until they're in-market before booking experiences.

And while a record number of Australians headed to Japan in 2024, unfortunately, the same can't be said in reverse. Inbound bookings from Japan continue to show slow progress when it comes to experiences - and while the country's economy is starting to show signs of stronger growth in 2025, it may be a while before the impact of this reaches Australian shores.

Top experience categories for international markets in Spring/ Summer 2025, by booking volume



Theme Parks
+57% YOY

Scenic & Dining Cruise
+5,494% YOY

Reef & Island Cruises
+148% YOY

Tourist Attraction Pass
+6,642% YOY

What's trending for international tourists?

While there's sustained demand for traditional entertainment - such as theme parks - from international travellers, our data is pointing to strong growth in a number of other areas too.

While tourists are making their way back to Australia, we're noticing they're keen to ensure trips are as cost-effective as possible - with demand for packaged experiences surging by an incredible **+6,642%**. There's also increasing interest in eco-tourism as travellers make their way back to nature (and our unique heritage and history), whilst adventure activities like Jet Boats and Jet Packs have grown rapidly too, by **+739%** year-on-year, to buoy the adventure tourism segment.

David Anderson, co-founder and CEO at Big Red Group, comments:

CEO SPOTLIGHT

"

While it's been a long road to get here - the continued growth in inbound tourism bookings we're seeing signals an exciting new era for Australia's experiences industry.

Our nation's appeal as a travel and holiday destination remains extremely strong, and with both established and emerging markets showing promising signs of growth - those operating within the market should start preparing themselves to cater to increasing demand.

Of course, the return of international tourists to Australia is not just about numbers. It's a reflection of the growing desire amongst domestic and international travellers for unique and meaningful experiences – something we are proud to be at the forefront of.

"

A state-by-state overview for Spring/ Summer 2025

In this section, we take a closer look at how each state has performed, unpacking emerging hotspots and key insights that have shaped the Spring/Summer experience market.

A deep dive into Big Red Group's booking data highlights a landscape of contrasts—some regions have experienced surging demand and record-breaking visitor numbers, while others have faced a more subdued season.

Given the sheer size and diversity of Australia, these mixed fortunes are to be expected. Weather patterns, local events, and shifting travel behaviours have all played a role in shaping the season, with some destinations thriving on the back of international arrivals and outdoor adventure seekers, while others have felt the impact of economic pressures or changing consumer priorities.

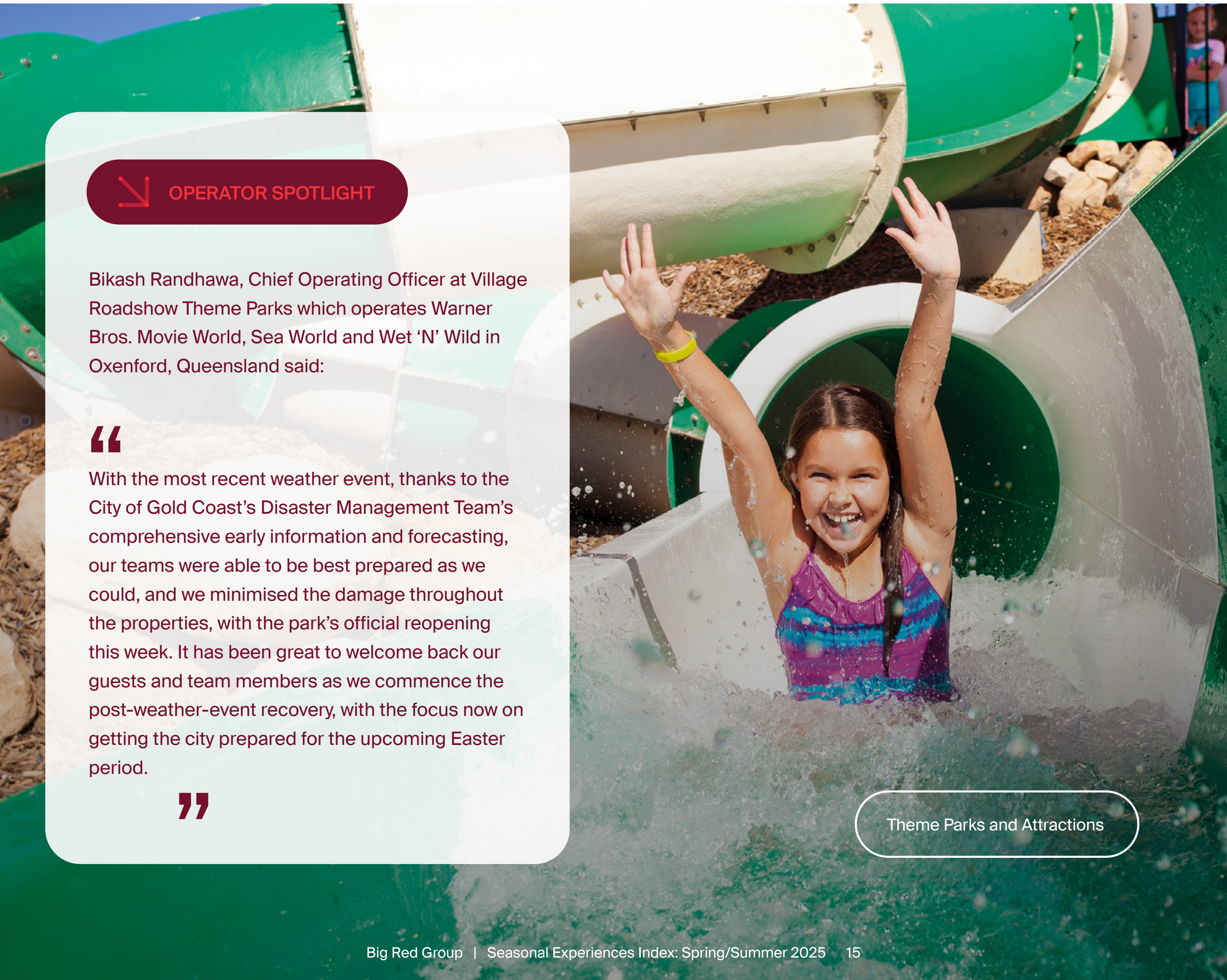
	Experiences Booked Autumn/Winter 24 for reference	Experiences Booked Spring 24	Experiences Booked Summer 25
ACT	-12.0%	-2.4%	-2.4%
NSW	-22.8%	-16.4%	-11.2%
NT	-18.5%	+4.2%	-23.0%
QLD	-5.7%	-18.5%	-38.6%
SA	-20.9%	-5.8%	+4.3%
TAS	-8.3%	-32.3%	-34.0%
VIC	+1.0%	-0.1%	+0.8%
WA	-18.3%	-15.8%	-11.8%

Big Red Group's booking analysis

With consumer spending habits continuing to evolve amid cost-of-living pressures - and travellers leaning into quality experiences over quantity - the general trend of fewer bookings across the nation might make this table seem negative at first glance, but there are promising signs of recovery and growth within:

- Victoria and South Australia are defying the odds to post growth year-on-year, with both states recovering from weaker Springs into stronger Summer periods.
- 'Direction of travel' in terms of experience bookings has been positive for half the nation, with ACT, NSW, SA and WA improving booking numbers from Autumn/Winter through to Summer.
- Queensland's numbers are heavily skewed by tourism recovery measures delivered by the Government following the December 2023 storms and cyclones that wreaked havoc statewide.

With data showing that certain states are still struggling to recover, namely Tasmania and Northern Territory, it's a sign that additional measures and support are required to prevent further slippage.



OPERATOR SPOTLIGHT

Bikash Randhawa, Chief Operating Officer at Village Roadshow Theme Parks which operates Warner Bros. Movie World, Sea World and Wet 'N' Wild in Oxenford, Queensland said:

> "With the most recent weather event, thanks to the City of Gold Coast's Disaster Management Team's comprehensive early information and forecasting, our teams were able to be best prepared as we could, and we minimised the damage throughout the properties, with the park's official reopening this week. It has been great to welcome back our guests and team members as we commence the post-weather-event recovery, with the focus now on getting the city prepared for the upcoming Easter period."

State-based highs and lows for the Autumn/Winter season

ACT

Autumn/Winter: -12.0% | Spring: -2.4% | Summer: -2.4%

While the nation's capital territory is not renowned for its tourism activity, it's pulled back from a weaker Autumn/Winter to deliver a relatively level Spring/Summer that's only marginally down from 2024. North and South Canberra have slipped by -5.3% and -26.2% year-on-year, with similar results for Molonglo and Tuggeranong.

Despite this, new experiences have brought bookings to Canberra's eastern fringe, while Weston Creek is up + 24.2% overall. Popular experiences to defy the odds in the ACT this season include the Treetops Adventure Canberra in Majura.

NSW

Autumn/Winter: -22.8% | Spring: -16.4% | Summer: -11.2%

While typical tourism hotspots across NSW, including Sydney's inner city (-29.3%), Port Stephens (-54.8%) and the Hunter Valley (-20.5%) have experienced a weaker season, the Blue Mountains - including Katoomba and Leura - have reined supreme, posting a +29.6% increase on 2024. This has helped NSW to pull back from a weaker Autumn/Winter to improve through Spring and into Summer.

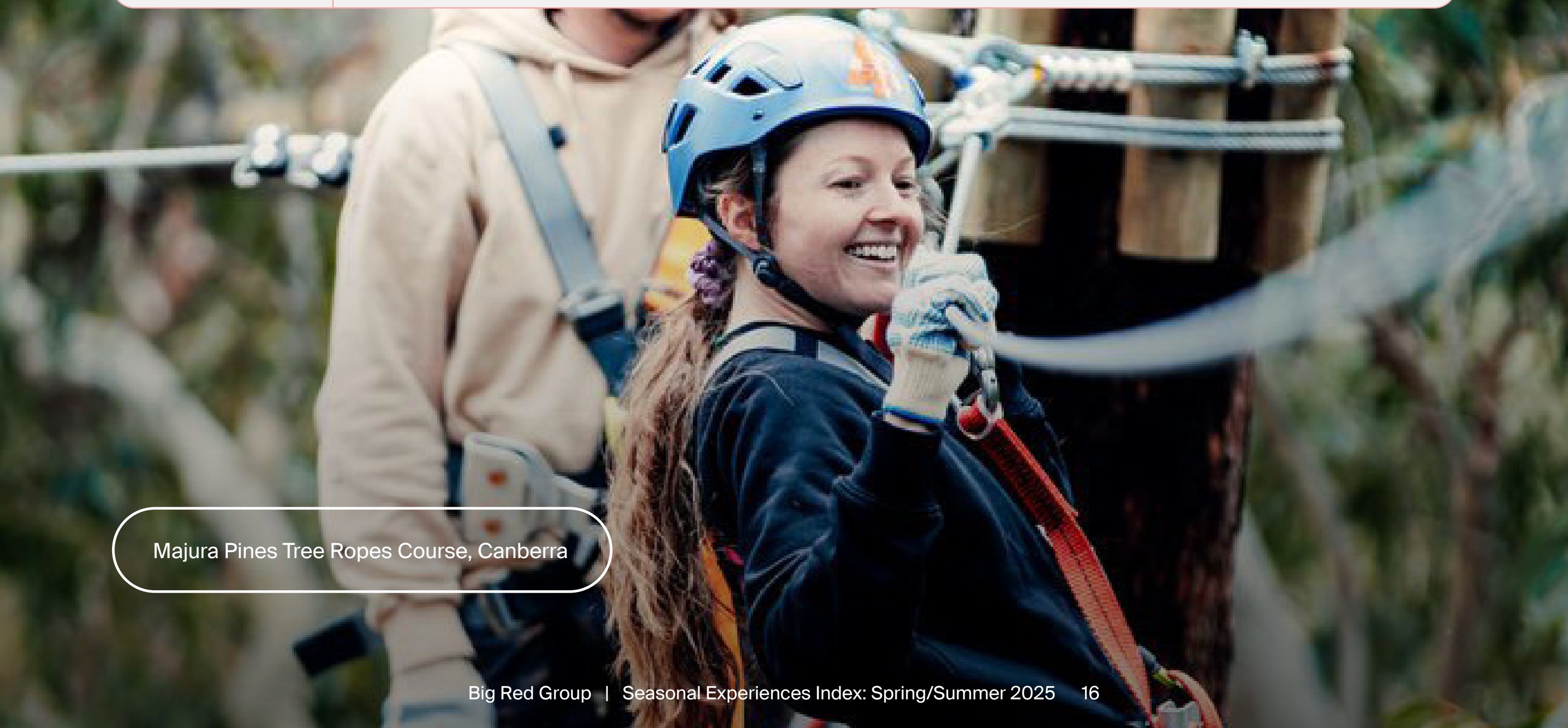
There's been success in a variety of outer city locations too, with Nova Cruises helping Newcastle to +8.2% annual growth, while Baulkham Hills (+11.0%), Young (+13.4%), Camden (+118.6%) have seen stronger seasons too.

NT

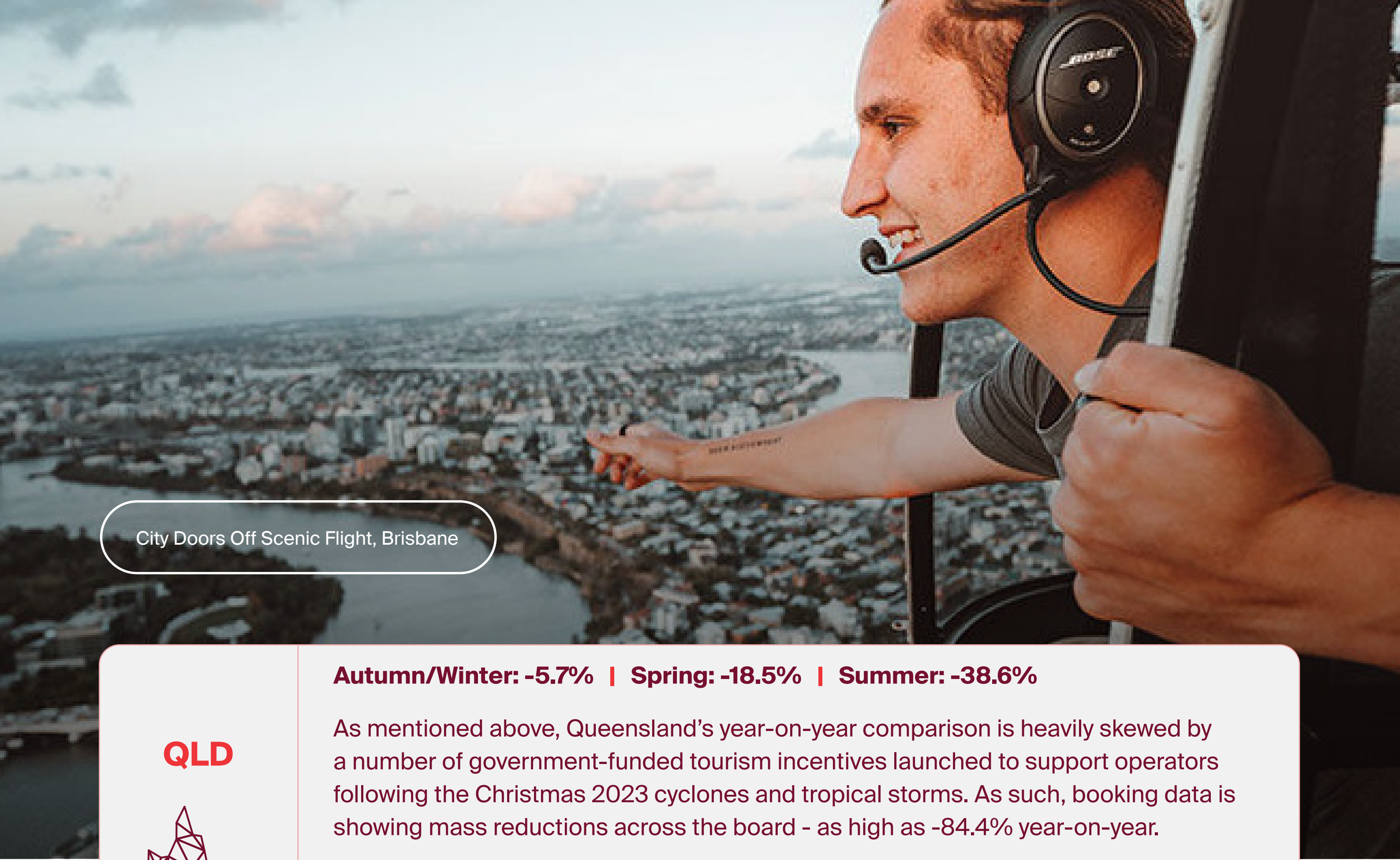
Autumn/Winter: -18.5% | Spring: +4.2% | Summer: -23.0%

While the Northern Territory has most certainly experienced a season of two halves, with a stronger Spring ultimately dipping into Summer - there's cause for optimism overall. While bookings in Katherine have contributed towards the overall dip, down by -82.9% year-on-year, there've been significant gains elsewhere.

Wharf One and Airborne Solutions have resulted in Darwin City (+30.3%) and its wider suburbs (+81.0%) both being considerably up this season, while Alice Springs has also recovered from a weaker Autumn / Winter period thanks to Outback Ballooning to post +10% growth this year and the Daly - Tiwi - West Arnhem region has also enjoyed +22.8% growth too.

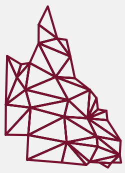


Majura Pines Tree Ropes Course, Canberra



City Doors Off Scenic Flight, Brisbane

QLD

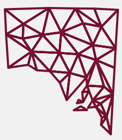


Autumn/Winter: -5.7% | Spring: -18.5% | Summer: -38.6%

As mentioned above, Queensland's year-on-year comparison is heavily skewed by a number of government-funded tourism incentives launched to support operators following the Christmas 2023 cyclones and tropical storms. As such, booking data is showing mass reductions across the board - as high as -84.4% year-on-year.

Despite this, Surfers Paradise, Cairns, Brisbane and Port Douglas continue to drive high volumes of bookings this year - while Ipswich Hinterland and Rocklea - Acacia Ridge have defied the odds to post growth this year, by +13.0% and +28.3%. For the latter, a suburb of Brisbane, this increase in bookings has largely been driven by a surge in demand for V2 Helicopters.

SA

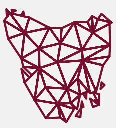


Autumn/Winter: -20.9% | Spring: -5.8% | Summer: +4.3%

South Australia has experienced a real change of fortunes over the past twelve months, moving from a considerable dip in Autumn/Winter to the best-performing state across the nation with a +4.3% growth year-on-year. While Adelaide (-10.5%) and Kangaroo Island (-26.9%) have seen a reduction in bookings this year, there's been growth for Holdfast Bay (+7.5%) thanks to Temptation Sailing, Murray and Mallee (+14.0%) and West Torrens (+125.2%) - which has more than doubled its figures in comparison to last year.

And when it comes to two of Adelaide's top wine regions, there's mixed fortunes here too. While the Barossa region continues to drive a greater number of experience bookings, it's slipped by -8.4% this year - while Adelaide Hills has climbed by well over a fifth (+23.9%).

TAS



Autumn/Winter: -8.3% | Spring: -32.3% | Summer: -34.0%

It's been a pretty challenging season for Tasmania overall - with bookings in Australia's most southern state down across the board. Dips in key cities Hobart (-44.7%), Devonport (-47.8%), and Launceston (-39.9%) are matched in more remote areas of the state, with the Meander Valley, to the west of the River Tamar, a bright spot after showing +9.7% growth.

It's not all bad news, however. There have been some runaway successes for Tasmania in terms of experiences through Spring/Summer, including Pennicott Wilderness Journeys in Hobart and Oceanic Spa in Moonah demonstrating that travellers have a keen interest in wellness experiences.

VIC

Autumn/Winter: +1.0% | Spring: -0.1% | Summer: +0.8%

As Australia's second-largest state for tourist consumption, Victoria has continued to shift between a year of minimal growth and on-par numbers - ultimately seeing a slight uptick in experiences come Summer. While Melbourne's inner city continues to drive the majority of bookings, it's dipped slightly year-on-year - by -18.9% - whilst nearby Port Phillip has seen a more considerable drop of -66.0% this season.

There's better news elsewhere however, with the Mornington Peninsula (+23.9%), the Bellarine and the Surf Coast (+3.0%) boosted by wine-tasting experiences at Bellarine Estate - and the Macedon Ranges surging thanks to similar experiences at Cleveland Estate. Further afield, Geelong (-22.3%) and Ballarat (-82.4%) both experienced relatively challenging seasons.

Wine Tour with Ferry Ride, Mornington and Bellarine Peninsula

WA

Autumn/Winter: -18.3% | Spring: -15.8% | Summer: -11.8%

As in the Autumn/Winter season, Perth continues to be a city of two tales, with the city's southern suburbs slipping by -55.2% year-on-year as inner city bookings saw a +9.3% increase overall. The latter result puts Perth city in pole position for experience bookings in Western Australia this season, largely driven by cocktail and cooking classes as well as floatation tank experiences.

Meanwhile, holiday hotspots, including the Augusta, Margaret River and Busselton region and the suburb of Joondalup - most famously known for its proximity to Rottnest Island - have both experienced quieter seasons, down by -28.2% and -40.2% respectively, whilst Bunbury (+9.8%) and Bayswater (+46.6%) have shown signs of growth.up by +17.4% year-on-year.

Australia's top 25 experience destinations this season

As Australians continue to prioritise unique and memorable experiences, key destinations across the country are thriving. From adrenaline-fuelled adventures in the outback to luxury escapes by the coast, these top 25 locations showcase the best of Australia's diverse experience industry through Spring/Summer 2025.

01. Sydney, NSW
02. Oxenford, QLD
03. Cairns, QLD
04. Surfers Paradise, QLD
05. Melbourne, VIC
06. Helensvale, QLD
07. Mornington Peninsula, VIC
08. Docklands, VIC
09. Mosman, NSW
10. Main Beach, QLD
11. Miller's Point, NSW
12. Coomera, QLD
13. Lower Hunter Valley, NSW
14. Blue Mountains, NSW
15. Brisbane, QLD
16. Port Phillip City, VIC
17. Yarra Ranges, VIC
18. Perth, WA
19. Fremantle, WA
20. Surf Coast / Bellarine Peninsula, VIC
21. Port Douglas, QLD
22. Adelaide, SA
23. Barossa Valley, SA
24. Stradbroke Island, QLD
25. Whitsundays, QLD


/ Sydney, NSW


/ Port Douglas, QLD


/ Fremantle, WA


/ Surf Coast | Bellarine Peninsula, VIC


/ Barossa Valley, SA

Emerging tourism & experience trends

With the tourism and experiences industry making strides towards recovery, large scale events and cultural moments are back - and in a big way too.

Such moments are drawing in visitors - both domestic and international - to travel across the nation with purpose and reconnect at an array of festivals, concerts, sporting and cultural events and experiences. Of course, as schedules get busier and busier, there's also been a heightened demand for activities that prioritise wellbeing. From wellness retreats to nature escapes, experiences that offer relaxation, balance, and rejuvenation have become more essential to Aussies than ever.

Increased appetite for more meaningful and restorative experiences has also led to a surge in demand for Indigenous tourism. From guided cultural walks to storytelling rooted in heritage and tradition, indigenous experiences are providing a deeper connection to the land and a renewed sense of balance in an increasingly fast-paced world.

Big Red Group's wealth of data on how Australians and international visitors alike are experiencing the country has enabled us to identify trends that are set to dominate in coming seasons and beyond.

Game, set and match for sports tourism

While sports tourism has been steadily climbing in recent years, it's set to reach a fever pitch in 2025 with major events across multiple states and sports attracting record crowds and acting as a powerful driver of both domestic and inbound travel.

This January saw a record 3.3 million travellers touch down in Melbourne, as crowds came to gather for the first tennis Grand Slam of the year at the Australian Open. This year's sell-out event drew record numbers, with 1.2 million people attending over the three-week tournament - a 9% increase from 2024. This ultimately triggered a halo effect as the local economy boomed over the course of the event.

This surge was replicated across sporting codes. Over the 2024 AFL Grand Final in September, Virgin Australia reported substantial spikes in flight bookings on its Sydney-Melbourne and Brisbane-Melbourne routes.

The following weekend - which saw the Penrith Panthers take on Melbourne Storm for the 2024 NRL Grand Final - corporate travel bookings accounted for over two-thirds (68%) of all bookings according to Corporate Traveller as fans sought an extended stay.

This surge underscores the growing appeal of live sporting events as central components of travel experiences. Last year, Big Red Group Data showed how the Australian Grand Prix delivered huge gains for Melbourne's tourism and experience economy - with inner city bookings up by **+67%** year-on-year - and Formula Ford experiences seeing a **+45%** growth too.

With Skyscanner's Travel Trends 2025 report finding that 28% of Australian travelers plan to travel for sporting events this year, we're predicted that this trend will grow significantly in 2025, and with major events on the horizon - including NBA exhibition games, Australia's first-ever NFL regular season game in 2026, and the 2032 Olympics - there's no doubt of the major opportunities for experience operators to tap into the nation's increasing appetite for sport-led travel.

OPERATOR SPOTLIGHT

Tim Beale, Director at Anglo Racing Academy, which operates the F1 Style Race Car in Wodonga, Victoria through Adrenaline, said:

"Motorsport is no longer just for die-hard fans—it's become a must-do experience for thrill-seekers and corporate groups alike. At Anglo Racing Academy, we've seen a huge increase in bookings from international travellers and local adventurers eager to tick 'driving an F1-style race car' off their bucket lists.

The influence of Drive to Survive, the Melbourne Grand Prix, and even events like Bathurst 1000 continues to fuel demand, bringing in a new wave of motorsport enthusiasts, many of whom had little to no previous exposure to motorsport —including a marked increased in interest and participation from female drivers than ever before. The world of sports tourism is booming, and we're proud to offer one of the most exhilarating experiences out there."

Wodonga Drive an F1 Style Race Car

Aussies dip their toe (and wallet) into wellness tourism

Australia continues to enjoy its position as a leading destination for wellness tourism, with overseas visitors attracted to the country's diverse natural landscapes and exceptionally strong wellness culture.

Australians already spend approximately $5,239 AUD per year on wellness, according to Recovery Lab, placing the country sixth globally in terms of expenditure. With intent to travel and discretionary spending increasing, health-conscious travel experiences are set to achieve a market size of $624 million AUD in 2025.

Big Red Group's own findings have shown that the Spa category is up by **125.3% year-on-year**, reflecting the increasing focus on self-care and relaxation, with Victoria, New South Wales and Western Australia leading the charge.

Interestingly, local government and regional tourism offices across the nation have picked up on the trend - and are already doubling down by investing heavily to bolster offerings. In 2024, West Australia's tourism body - Australia's South West - announced its Wellness Tourism Strategy that looks to position the region as the country's premier destination for nature-based wellness tourism by 2034.

And more recently, Mount Barker Council in South Australia announced plans for a $50 million luxury hotel at Summit Precinct, which is set to include a $15 million wellness centre to cater to growing demand for wellness-focused experience.

With operators Hepburn Bathhouse and Spa in Hepburn Springs (+220%), Peninsula Hot Springs in Fingal (+174.6%), and Alba Thermal Springs and Spa in Fingal (+72%) all experiencing a notable rise in bookings, there's no sign of wellness tourism falling by the wayside anytime soon - if anything, it's set to flourish further throughout the year.

OPERATOR SPOTLIGHT

Sherelle Fyfe, Partnerships & Promotions Manager, at Alba Thermal Springs and Spa, which operates thermal springs & spa bathing and dining experience, in Fingal, Victoria, through RedBalloon, said:

"Alba has seen a strong influx of guests seeking wellness-focused experiences, drawn to the opportunity to unwind and recharge. With more travellers prioritising their wellbeing, our range of offerings, whether that's soaking in the hot springs, indulging in delicious food, or enjoying a spa treatment, provides guests with the right balance of relaxation and rejuvenation. We are seeing that more travellers are opting for health-conscious experiences while they're away as they look to enhance their overall wellbeing and escape the stresses of everyday life."

Alba Thermal Springs & Spa Bathing

Tourists keen to immerse themselves in Indigenous culture

Indigenous tourism will continue to soar in 2025, as domestic and international tourists seek out immersive and authentic cultural experiences. It comes as recent Tourism Research Australia insights on First Nations tourism show 3 million trips between 2023-2024 incorporated some kind of Indigenous experience - the highest annual number of trips on record.

While the sector has been steadily growing, it continues to evolve and shift to ensure the communities running the experiences can reap sustained benefits long after guests depart.

As interest in authentic cultural encounters grows, there's been a notable shift toward ensuring greater support for Indigenous operators. Calls for external support of all shapes and sizes is also growing - with businesses going so far as to lobby for a new Indigenous tourism body in Australia to help support and scale up operators, as travellers increasingly look for responsible and sustainable experiences that respect cultural values.

Last year, Big Red Group showed support by entering a partnership with not-for-profit Welcome to Country, increasing access to Aboriginal and Torres Strait Islander experiences and supporting First Nations operators. NSW also recorded a staggering 814,300 international and domestic overnight visitors who participated in Aboriginal tourism experiences, according to Tourism Research Australia.

With growing demand, increased industry support, and record-breaking participation, Indigenous tourism is set to remain a key pillar of Australia's visitor economy in 2025 and beyond. With continued and considered investment, plus structural support, the sector is well-positioned to grow, offering visitors deeper connections to Australia's rich cultural heritage for years to come.

BIG RED GROUP The Experience Network.

About Big Red Group

Big Red Group is the largest experience network in Australia and New Zealand. A powerful connector that provides more than 3,000 experience operators with quality customers and the tourism industry with trusted intelligence and partnership.

Australian owned, Big Red Group operates an industry-leading platform, enabling the wholesale distribution of experiences through domestic and international partners, powering its renowned domestic marketplaces RedBalloon, Adrenaline, Experience Oz, and Everything NZ. Equipping in-destination experience retailing through hotels and travel agents through its Local Agent offering. As well as a suite of software products and services to support experience operators grow their businesses.

With a purpose to 'shift the way people experience life', Big Red Group seeks to reduce the tide of consumption. Encouraging people to choose 'stories over stuff' at every opportunity. Together with our experience operators, we are on track to deliver an experience every second by 2030.

We are The Experience Network.

Our Brands

Our leading brands include Adrenaline, Experience Oz, Local Agent and RedBalloon. Each brand plays a complementary role within our portfolio and the experience industry.

ADRENALINE

Australia's most recognised adventure experiences brand, connecting the adventurous at heart with the adventures they seek.

EXPERIENCE OZ

Renowned for its accessibility, simplicity and inspiration, serving the domestic holiday market for more than a decade.

LOCAL AGENT

Australia's leading one-stop-shop for concierge booking tours and activities for more than 700 hotels.

redballoon

Australia and New Zealand's leading experience brand with 4 million+ experiences delivered, averaging 4.5 stars from 130,000 customer reviews.

bigred.group