



SYDNEY — MELBOURNE TOURING

UNLOCK OPPORTUNITIES
IN INBOUND TOURISM

Berry – 11th December 2025



TODAY'S FOCUS

- Market update: North America & UK/Europe
- Aviation development
- Inbound tourism benefits
- In-market feedback
- Opportunities for regional tourism operators





MARKET UPDATE

North America

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- Strong demand & high spending – TA & airline messaging heavily positioned toward luxury travellers.
- Airline capacity rising — more non-stop flights, more seats.
- Looking beyond the traditional icons & seeking new, authentic regional experiences and storylines.
- Growing interest in self-drive, especially shorter Sydney+ circuit style itineraries (e.g. Sydney – South Coast – Canberra – Sydney)



MARKET UPDATE

UK/Europe

- Highly desirable markets & resilient demand. Stronger mid-tier/4-star segment than NA.
- High airfares having less impact on making travel decisions.
- Forward bookings strong overall (even booking for 2027), with pockets of variability
- Perception of Australia as a purely luxury destination is less common.
- Very high propensity to self-drive & major appetite for slow tourism, authentic regional and nature-based experiences.



AVIATION DEVELOPMENT



LATEST UPDATE FROM TOURISM AUSTRALIA

Aviation schedule shows future growth



Source: SRS Cirium Aviation. Flights from ALL except Australia to Australia (excluding Domestic)



LATEST UPDATE FROM TOURISM AUSTRALIA

Australia's aviation landscape continues to expand with new routes and services

UK/EUROPE

TURKISH AIRLINES
Istanbul-SIN-MEL 3fpw (started Mar-24)
Istanbul-KUL-SYD 4fpw (started 29 Nov-24)
QANTAS
Paris-Perth 4-3fpw (started 12 Jul-24)
EMIRATES
Adelaide services 7fpw (started 28 Oct-24)

GREATER CHINA

CHINA SOUTHERN
Guangzhou-Darwin B737-max 8 At 3fpw
(Starts 3 Dec-25)
CAN-Perth 3fpw (started 28 Nov-24)
CAN-Adelaide 3fpw (started 12 Dec-24)
CATHAY PACIFIC
Hong Kong-Cairns 3fpw
(started 17 Dec-24, season to 29 Mar-25)
JUNEAU AIRLINES
Shanghai-SYD/MEL 7-3fpw (started 17 Dec-24)
CATHAY PACIFIC
Hong Kong-Adelaide A350-900 At 3fpw
(seasonal service starts 11 Nov-25 to 27 Mar-26)
HONG KONG AIRLINES
Hong Kong-Sydney A330 At 4fpw (started 21 Jun-25)
Hong Kong-Melbourne A330 At 3fpw
(seasonal service starts 12 Dec-25 to 27 Mar-26)
SHENZHEN AIRLINES
Shenzhen-Melbourne A330 At 3fpw (starts 23 Dec-25)



NORTH AMERICA

AMERICAN AIRLINES
DFW-Brisbane 7fpw LAX-Melbourne 3fpw
(starts Dec-25 seasonal to Mar-26)
DELTA AIRLINES
LAX-Melbourne 3fpw
(starts Dec-25 seasonal to Mar-26)
LAX-Brisbane 3fpw (started 4 Dec-24)
LAX-Brisbane A350-900 At 3fpw
(second seasonal service starts 31 Oct-25 to 17 Mar-26)

NORTHERN AUSTRALIA

QANTAS
Singapore-Darwin B737-8 At 4fpw
(started 31 Mar-25)
JETSTAR ASIA
Singapore- Broome 2fpw
(seasonal service returns Apr-25 to Oct-25)
AIR ASIA
Kuala Lumpur-Darwin
A320neo At 4fpw
(started 27 Jun-25)
SINGAPORE AIRLINES
A350 Widebodies to Cairns
(started Apr-24)
AIR ASIA INDONESIA
Denpasar-Cairns 3fpw
(started 14 Aug-24)



QANTAS PROJECT SUNRISE

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**Direct flights between Sydney & Melbourne and London & New York
expected to start from mid 2027.**



TURKISH AIRLINES DIRECT FLIGHTS



**Non-stop flights between Istanbul and Sydney from late 2026 (Melbourne to follow)
with extensive network connecting UK/Europe to Australia.**

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DELTA AIR LINES NEW FLIGHT TO MELBOURNE



Thrice weekly LAX to MEL to compliment daily flight to SYD and BNE



QATAR AIRWAYS CANBERRA RE-LAUNCH



Daily Doha – Canberra (via Melbourne) flight from Dec 2025



VIRGIN AUSTRALIA & QATAR AIRWAYS PARTNERSHIP



**Increasing international capacity + greater access to
domestic network connection**

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FIJI AIRWAYS CANBERRA - NADI & BEYOND



**Twice weekly non-stop flight since July 2023 with connection to/from
North America (LAX, SFO, YVR, DFW)**

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INBOUND TOURISM BENEFITS





WHY CONSIDER INBOUND TOURISM

Key benefits

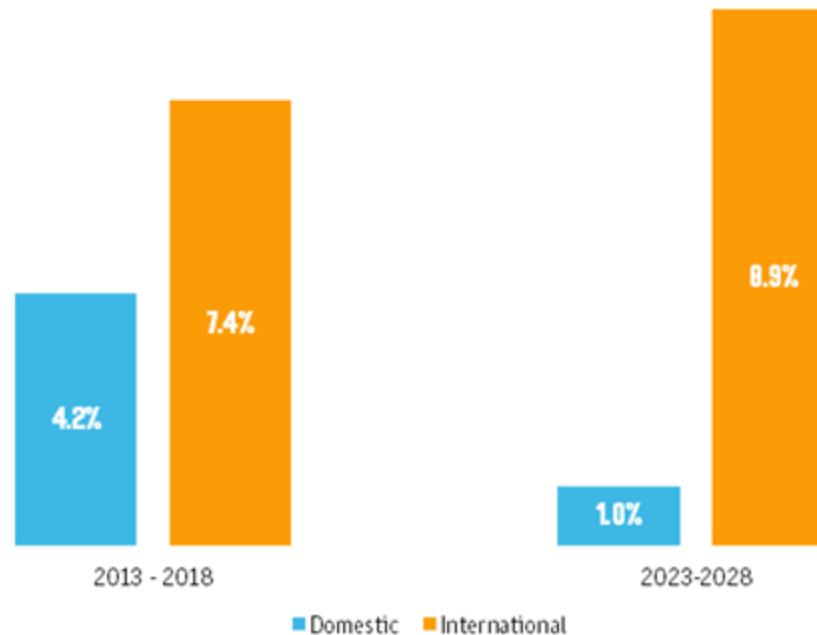
- They travel mid-week and off-peak seasons.
- Longer lead times on bookings.
- Spend more – high value visitors.
- Self drive itineraries are more flexible and not fixed to tight schedules
- You only pay commission when you get the business



WHY CONSIDER INBOUND TOURISM

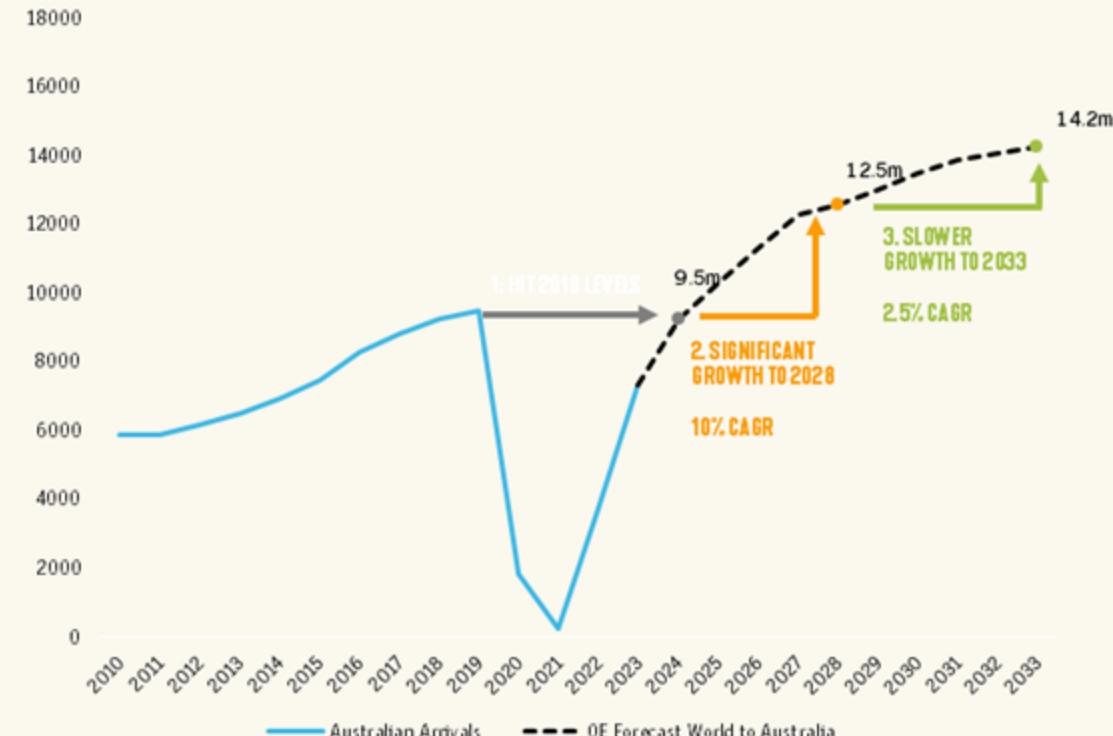
5-YEAR AVERAGE ANNUAL GROWTH RATES (%) DOMESTIC VS INTERNATIONAL

Expenditure in real terms



Source: Tourism Research Australia, Tourism forecasts for Australia 2023 to 2028

WORLD TO AUSTRALIA ARRIVALS & FORECAST



Forecast at December 2023



TAMARA COOK

Mariners Cove



DAMIEN CERANTONIO

Great Ocean Road Resort



SIMONNE LIBERMAN

Genesta House B&B

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IN-MARKET FEEDBACK

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OPPORTUNITIES FOR TOURISM OPERATORS





REGIONAL PRODUCTS IN INTERNATIONAL ITINERARIES

- Add authentic, local experiences that complement major icons, helping travellers feel they're seeing the 'real Australia', not just big cities.
- Increase the chance for trade agents to sell those 'This is Australia' moments (nature, wildlife, indigenous culture, local produce).
- Align strongly with the rising demand for nature, wellness, slow-tourism and immersive experiences.
- Extend overall trip length and increase traveller spend that benefits the wider regional community.
- Ideal for off-season and shoulder periods, helping smooth out seasonal peaks.
- Support sustainability tourism by dispersing visitors beyond high-pressure hotspots





PREPARE TO BE TRADE READY

- Clear product proposition – know your markets and who you are targeting.
- Consistent service delivery and ability to cater for special requests & varied needs.
- Easy, reliable booking process with quick turnaround (API integration, online portal, via email, etc).
- Appropriate commission rates that meet trade expectations across different levels.
- Flexibility with minimum night stays & blackout dates.
- Packaging with complementary local operators to strengthen your offer.
- Ability to support trade training & familiar requests.



X SYDNEY — X
X MELBOURNE
TOURING X



INBOUND TRADE CONTRACTING

- Rates need to be set for 12 – 18 months in advance for ITOs, OTAs and wholesalers.
- Operators provide appropriate commissionable rates that stay consistent for the full contract period.
- Contracts outline inclusions, availability, terms, conditions and blackout dates clearly and upfront.
- Product must be reliable, ongoing and easy to book, ensuring agents can confidently add it to itineraries.
- Trade buyers rely on contracted product to build itineraries for brochures, websites and packaged deals.
- Provide updates and refreshed content to ensure your product remains front-of-mind with trade partners.
- Get help and partner with industry organisations.





NSW FIRST

Helps visitor economy businesses to develop, promote and sell world-class experiences.

PRODUCT DEVELOPMENT TEAM

Builds industry capability, advocates for NSW products and collaborates with industry and government.



Annika Leslie

Product Manager – Rail, Road, Cruise and Air



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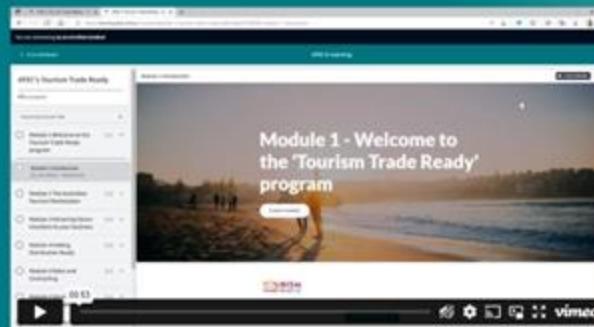
Program overview

Online learning modules:

1. Introduction to the Tourism Trade Ready program
2. The Australian tourism marketplace
3. Attracting travellers to your business
4. Getting distribution ready
5. Rates and contracting
6. Delivering experiences for future travellers
7. Mastering your pitch and closing the deal
8. Maximising your tourism trade sales efforts

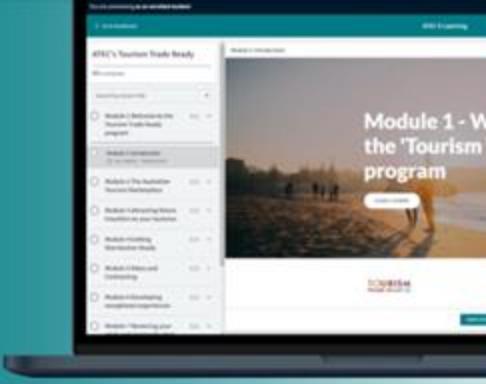
Preview

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Preview

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TOURISM TRADE READY PROGRAM

Provides fundamental knowledge and essential resources for the Australian tourism industry, with a commitment to trade effectively with the domestic and international marketplace.



Aaron Matis

Regional Manager – NSW, ACT & STH QLD



aaron.matis@atec.net.au





WORKING WITH SYDNEY MELBOURNE TOURING

- Government backed not-for-profit marketing organisation with 20+ years of international trade relationships.
- Strong advocate for product development.
- Represent participating products & regions at all major TA, ATEC and STO events and missions in key self-drive markets .
- Team Australia approach: other countries (Japan, Thailand, Canada, Maldives, etc.) are competitors, not within our own country.





WORKING WITH SYDNEY MELBOURNE TOURING

Tourism is all about relationships!



PARTICIPATION OPTIONS

Level 1

Supporting non-commissionable product

(This level is suitable for experiences that aren't usually pre-booked, such as wineries and eateries.)

\$450 inc GST

Promotion in agent training, inclusion in itineraries, preference booking for media and trade fairs and website listing.

Level 2

International Trade Partner

\$1,100 inc GST

All Level 1 inclusions, plus promotion to trade buyers through dedicated sales and marketing activity.

Level 3

Corporate Partner

\$2,200 inc GST

All of the Level 1 and 2 inclusions, but for more businesses with more than 1 product, across multiple locations.

Level 4

Preferred Product Partner

\$2,750 inc GST

All of the Level 1, 2 and 3 inclusions, as well as targeted trade marketing and pitches to include products in preferred programs.

2025-26 INTERNATIONAL PROGRAM NOW AVAILABLE

Delivering the program

At the forefront of international tourism

Sydney Melbourne Touring is a highly regarded organisation, valued by the travel trade to help them achieve their goals of delivering visitors into regional Victoria, NSW and the ACT.

We have strong relationships with international trade providers, built over a period of almost 20 years. We work with operators worldwide, but particularly in key self-drive markets of The Americas, The United Kingdom, Europe and South-east Asia.

Targeted events and development activities for 2025-2026 include:

- Australian Tourism Exchange
- ATEC Workshops and events
- Inbound Tour Operator training
- Familiarisation tours
- Media visits
- Marketplace South East Asia
- Marketplace North America
- Trade mission UK Europe
- Live Stream Agent Training
- Working with trade workshops
- Inbound Tour Operator introductions
- One-on-one support
- Destination Australia Conference

These activities represent a value greater than \$50,000 in sales & marketing. By working in a collaborative way, we aim to mitigate the cost to small business by undertaking all of this activity on behalf of our member businesses.



2025-2026 INTERNATIONAL TRADE MARKETING PROSPECTUS

For tourism businesses, working with international trade partners is essential to attract a steady flow of global visitors, year-round. By working with international travel agents, wholesalers, and tour operators, you can expand your reach, promote unique regional and seasonal experiences and tap into new markets attracting occupancy even in your quiet months.

Sydney Melbourne Touring works year-round with international trade to build awareness, provide product training and conduct general sales and marketing activities on behalf of its region and product members. Our two key touring routes showcase the rich diversity of Australia's coast and countryside. From charming wineries, wildlife, quaint villages and national parks, to cultural and historical sites.

Our *Coastal Discovery* is very well established in key international markets, while demand for the *Inland Discovery* is at an unprecedented high.

About the organisation

Sydney Melbourne Touring is a not-for-profit business that:

- connects members with international trade
- provides tourism training programs
- offers one-on-one support to help maximise

About the opportunity

No business is too big or too small to benefit from the opportunity Sydney Melbourne Touring offers.

We put your business at the forefront of our sales activity, providing trade training,



THANK YOU



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