

# The Future of Distribution

Dominic Mehling – Industry Relations Manager – ACT, NSW, NT & QLD

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# Who is Tourism Australia?

Tourism Australia is the Australian Government agency **responsible for attracting international visitors to Australia**, both for **leisure and business events**.

## Our Vision

To make Australia the most desirable & memorable destination on earth

## Our Purpose

To create demand enabling a sustainable and competitive Australian tourism industry

Brand & Marketing

Partnerships &  
Distribution

Public Relations & Famils

Australia.com & Social

Aviation

Insights

Business Events Australia

Industry Events

# Tourism Australia's 16 priority markets

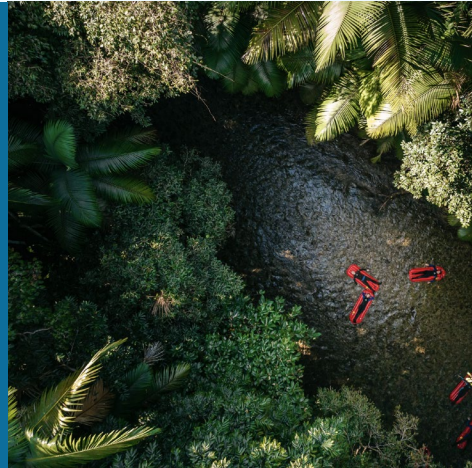


# Tourism trends influencing Australia to 2035



## The Asian Century Continues

While established markets remain vital, fast growing Asian economies will be important drivers of new tourism demand.



## Major Events Runway

Australia's significant pipeline of world-class sporting and cultural events will attract visitors in the lead-up to Brisbane 2032.



## The Run To Yield

The tourism industry is increasingly competing on value and unique offerings rather than just catering to mass-market volume.



## Experiences are Everything

Travellers are prioritising diverse, authentic experiences and unique journeys when choosing a destination.



## Future of Flight

Sustainable aviation fuels and new long-haul routes are set to redefine how travellers access Australia.

# The Future of Distribution

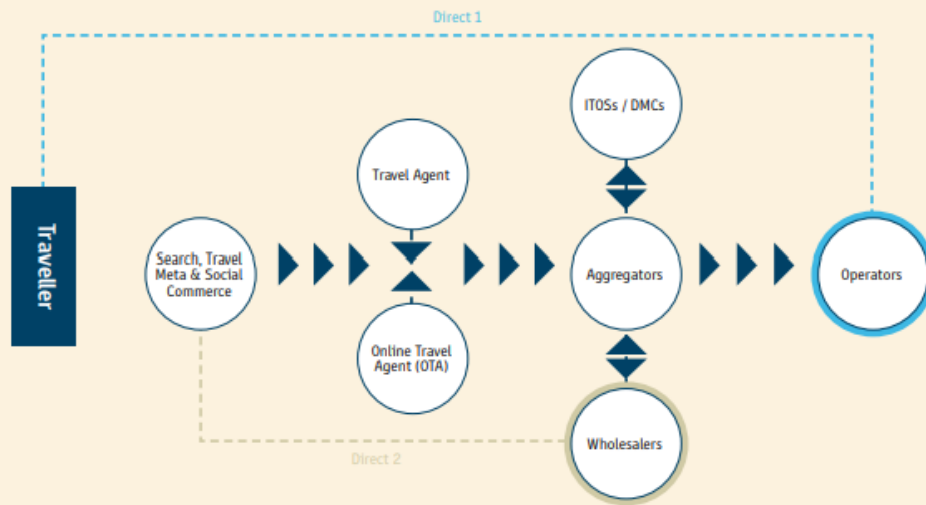
Distribution is all about  
maximising your reach.

It's especially important here.

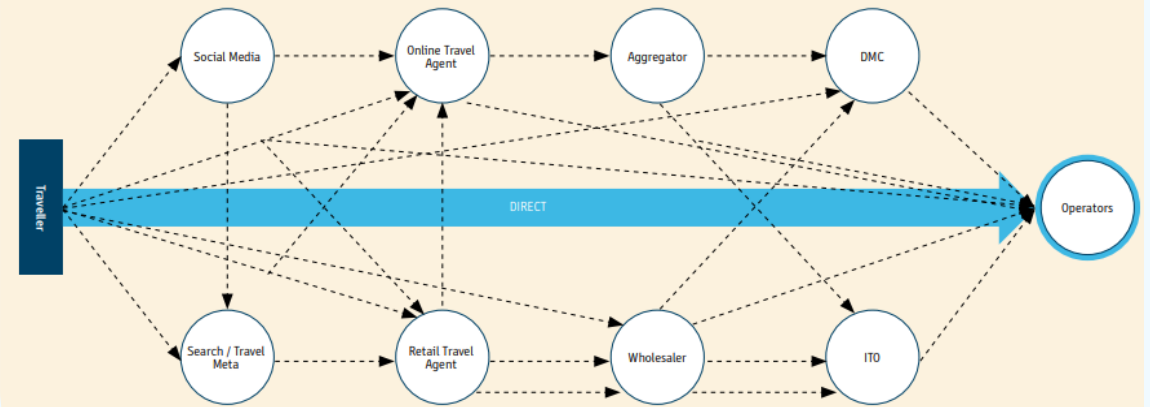
The complexity of Australia can be a barrier which distribution helps to overcome.

# A lot has changed over the last few years

## Lead up to the Pandemic

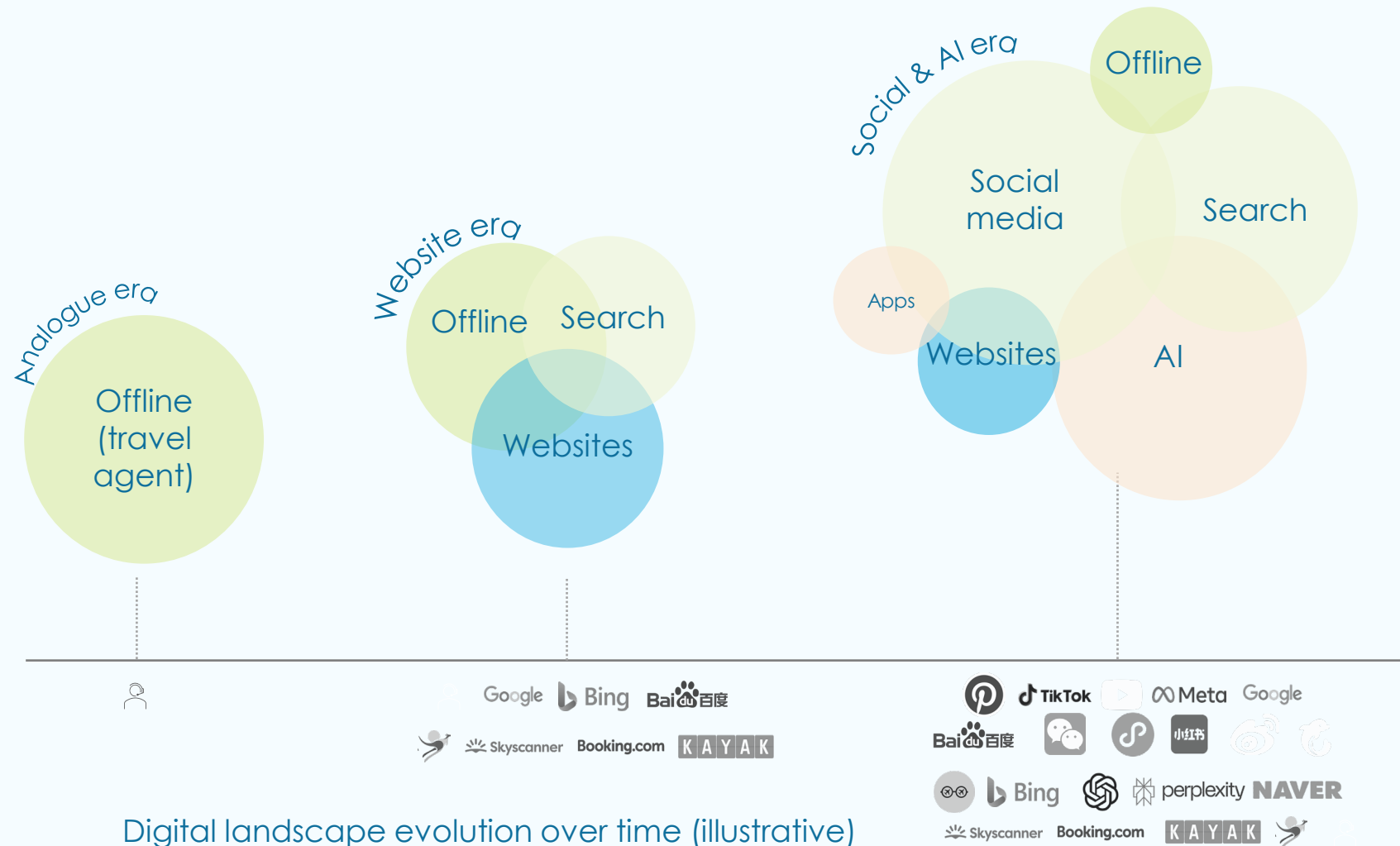


## Current State





# It's fast evolving



“55% of tourism operators  
in APAC  
do not have a live  
integrated  
booking system”

Source: Arival; The State of Booking Tech; September 2025

# Four mega themes shape the future of distribution

Channel  
Proliferation



Rising  
Expectations



Tech  
Democratisation



Complexity  
Intensifies





Mega Trend:

# Channel Proliferation

# Certain travellers are more likely to book via a distributor



**Age**  
Older Travellers



**Travel Party**  
Families



**Budget**  
High Trip Spend



**Distance**  
Long Haul Markets



**Familiarity**  
First Time Visitors



**Complexity**  
Complex Itineraries

# Travellers are booking one trip across multiple channels



In person  
Travel agent



Online  
Travel agent



Travel meta  
search



Travel  
Wholesaler



Airline direct



Operator direct



Mega Trend: Channel Proliferation

# What operators could consider

- Do you need to review your distribution strategy?
- Has there been a change to the way people are finding and booking your product or service?
- Are you using ATDW for direct opportunities?
- Are you exploring social for marketing and conversion?

Mega Trend:  
**Rising Expectations**

# Three consumer needs take precedence



Personalisation  
is on the rise



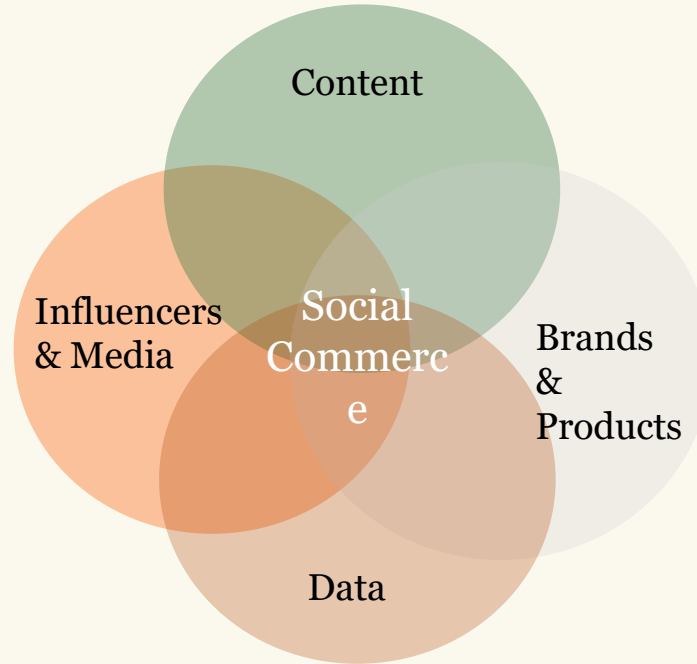
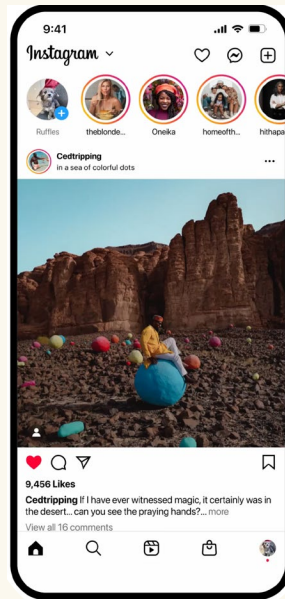
The need for  
control is  
heightening



Trust has never  
mattered more



# Social commerce will shift travel trends



## Western Market Platforms



Instagram



Facebook



Pinterest



TikTok

## Eastern Market Platforms



Little Red Book



Kakao



Line



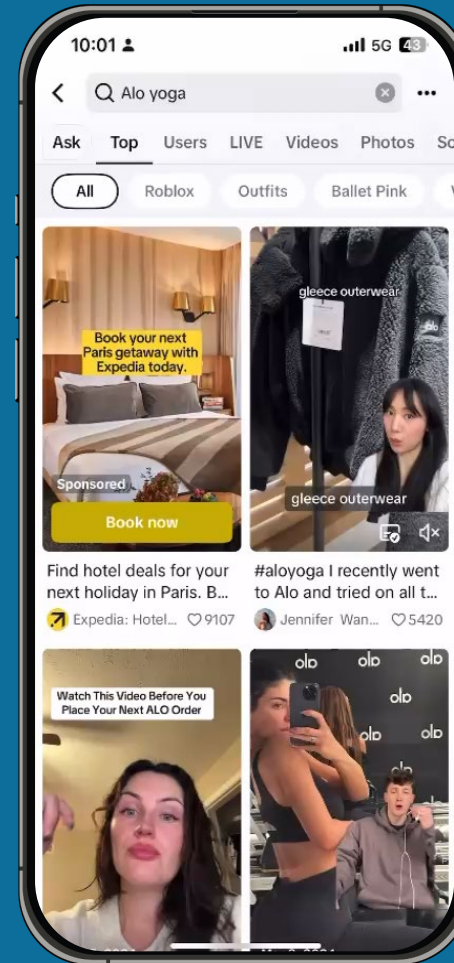
Douyin

# Social Commerce



Chinese platforms offer  
a **deeply integrated**  
experience.

Seamlessly integrating  
shopping, payments,  
and social interaction  
within a single  
ecosystem.



Western platforms still  
rely on external sites for  
transactions.

An extension of  
existing content and  
advertising models  
rather than a fully  
integrated system

Mega Trend: Rising Expectations

# What operators could consider

- Do you need to review your booking terms?
- Do you regularly review your customer reviews to ensure your product is still hitting the mark?
- Does your website show your credentials as a trusted source?



Mega Trend:

# Tech Democratisation

# Technology is changing everything

## Customer facing

### Search



Google



Baidu



Pickyourtrail



GuideGeek



Rome2Rio



Hopper



Hotel Tonight



Airbnb



KAYAK



Tripadvisor



Triplt



Travel Spend



iTranslate

### Trip planning & Personalisation

### Price Prediction

### Booking apps

### Chatbot & concierge

### Reviews

### Services

## Productivity

### Website & Distribution



cinefly



Localize



MarketMuse



Magpie

### Content creation & translation

### Dynamic pricing



boostAR



Amadeus



Chat 2



TourConnect

### Enquiries

### Bookings Management



Rezdy



TourRadar

### Workforce Efficiencies



Localis



Deputy

### Reviews & brand sentiment



Brand24



Podium

Mega Trend: Tech Democratisation

# What operators could consider

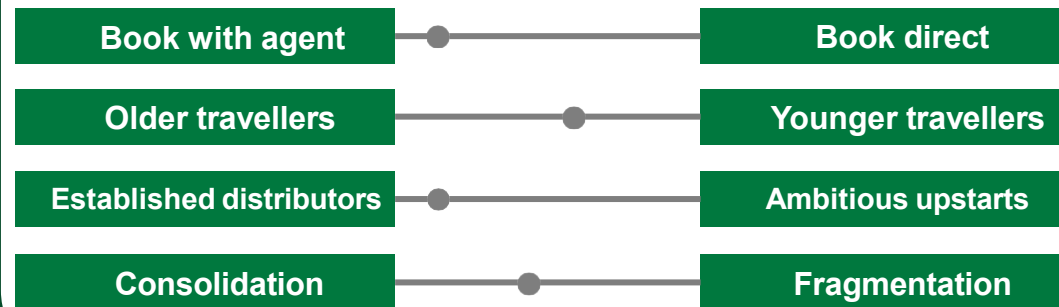
- How are you selecting your technology partners?
- Do you need a data strategy in place?
- Do you use dynamic pricing software?
- Can you enhance your product offerings on your website?
- Are you considering AI tools to enhance routine tasks?

Mega Trend:  
**Complexity Intensifies**

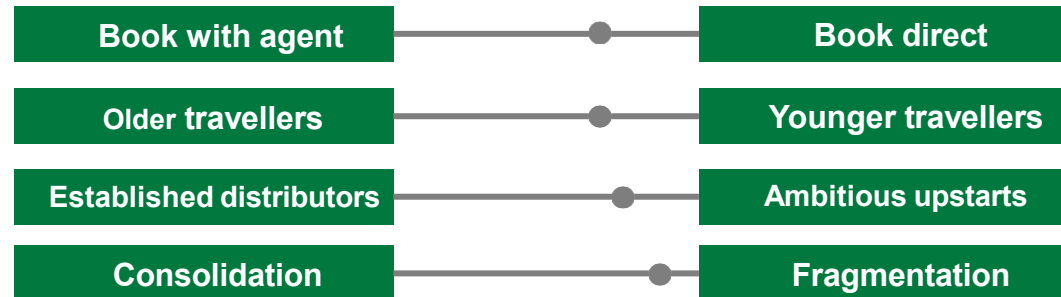
# UK remains heavily book with agents, while India has become increasingly fragmented



## United Kingdom

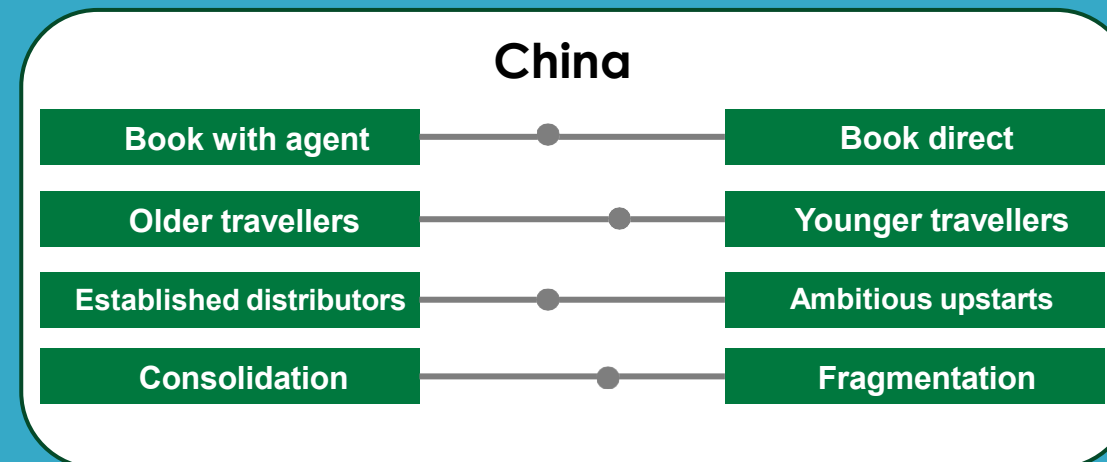
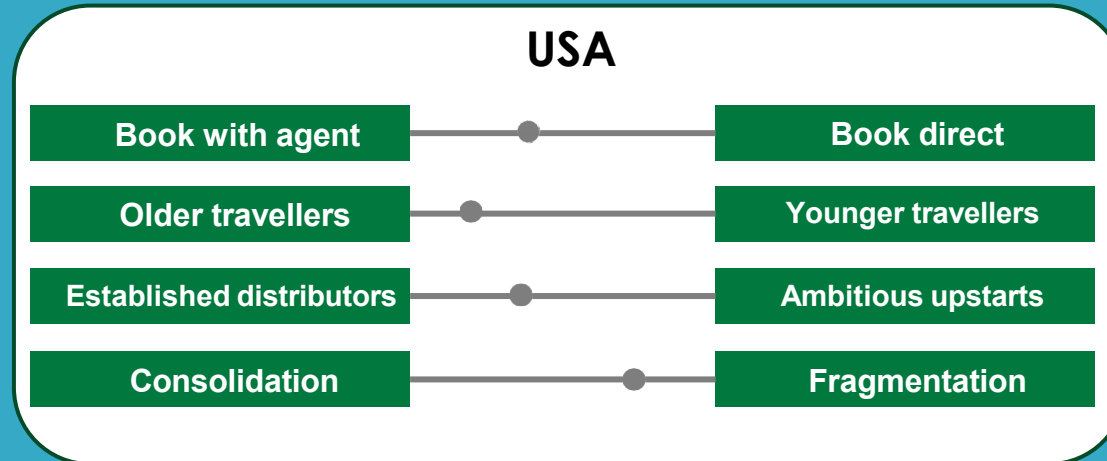


## India





# USA and China have a valuable mix of big and small distributors



Mega Trend: Complexity Intensifies

# What operators could consider

- What markets would you like to source customers from?
- Are you across the distribution landscapes of your markets?
- Does your distribution strategy in these markets still fit?

# Recap... The 4 Mega Trends and what it means

## Channel Proliferation

The opportunity to enhance your distribution strategy

## Rising Expectations

Understand your customer characteristics and understand that they are evolving

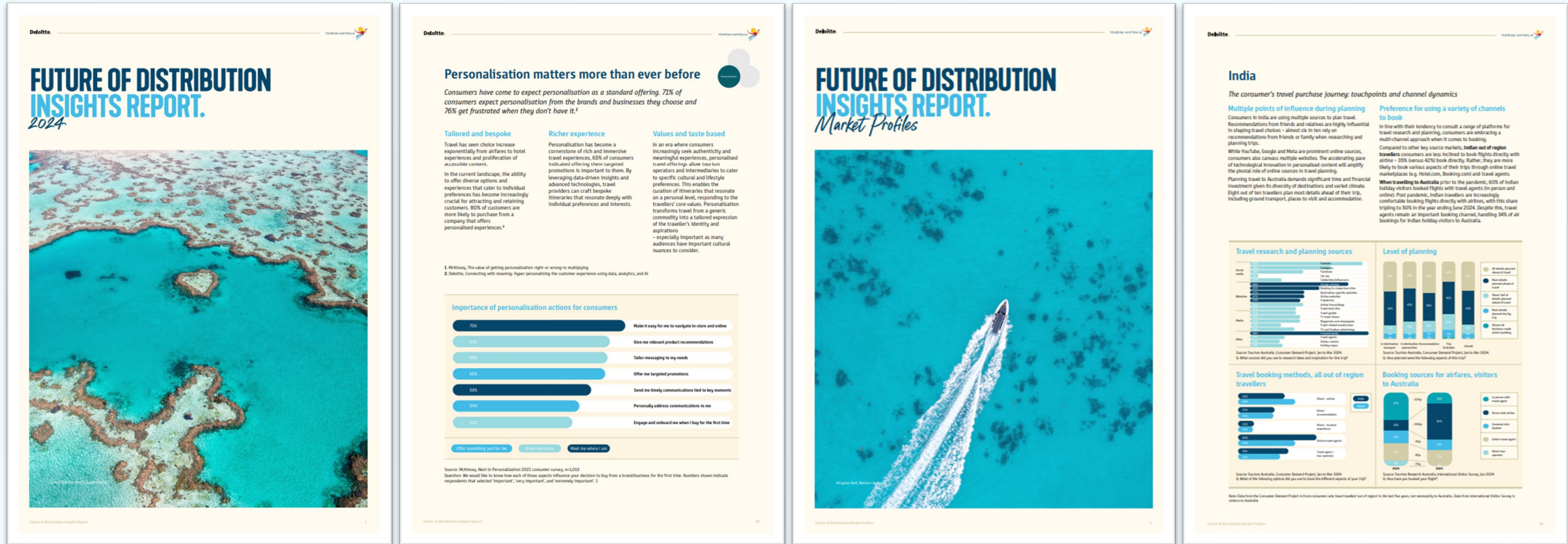
## Tech Democratisation

Identifying technology opportunities and being ready to adapt

## Complexity Intensifies

Understanding key markets and distributors  
– It's not once size fits all

# The Future of Distribution Report & Market Profiles



[tourism.australia.com/insights](https://tourism.australia.com/insights)



# Come along on the journey

## Information & Insights

Corporate  
website

[tourism.australia.com](http://tourism.australia.com)

Research &  
Insights

[tourism.australia.com/  
stats](http://tourism.australia.com/stats)

Newsletters

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Webinars

[tourism.australia.com/  
webinars](http://tourism.australia.com/webinars)

## Demand Opportunities & Distribution

Key  
Distribution  
Partners

[tourism.australia.com/  
marketregions](http://tourism.australia.com/marketregions)

Trade Events

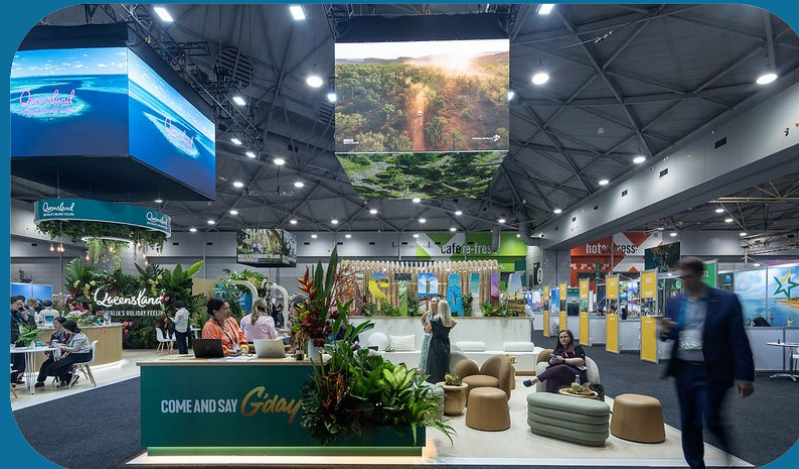
[tourism.australia.com/  
events](http://tourism.australia.com/events)

PR, Famils &  
Social Media

[tourism.australia.com/  
workingwithmedia](http://tourism.australia.com/workingwithmedia)

Update ATDW

[ATDW.com](http://ATDW.com)



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**Dominic Mehling**

Industry Relations Manager –

ACT, NSW, NT & QLD

[dmehling@tourism.australia.com](mailto:dmehling@tourism.australia.com)

+61 400 935 173

## Thank you!

