



The Future of Distribution

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



The Asian Century Continues

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



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



Major Events Runway

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



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

The Future of Distribution

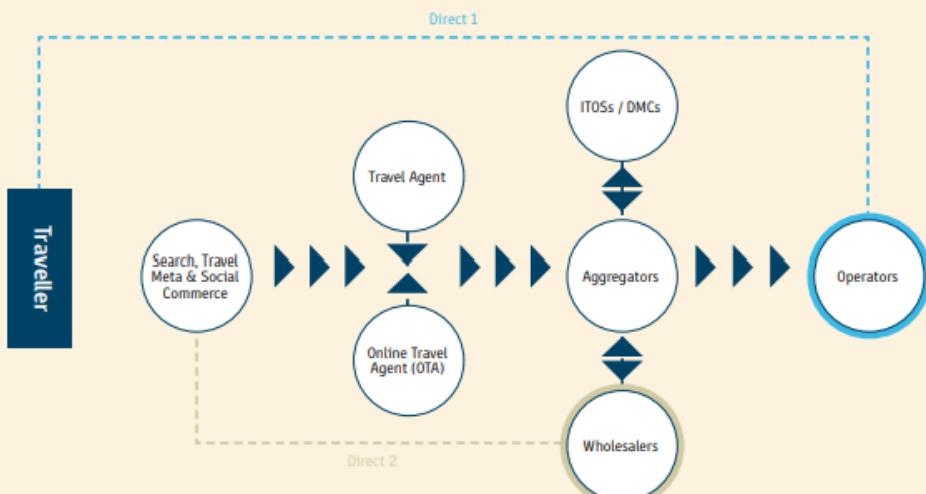
Distribution is all about
maximising your reach.

It's especially important here.

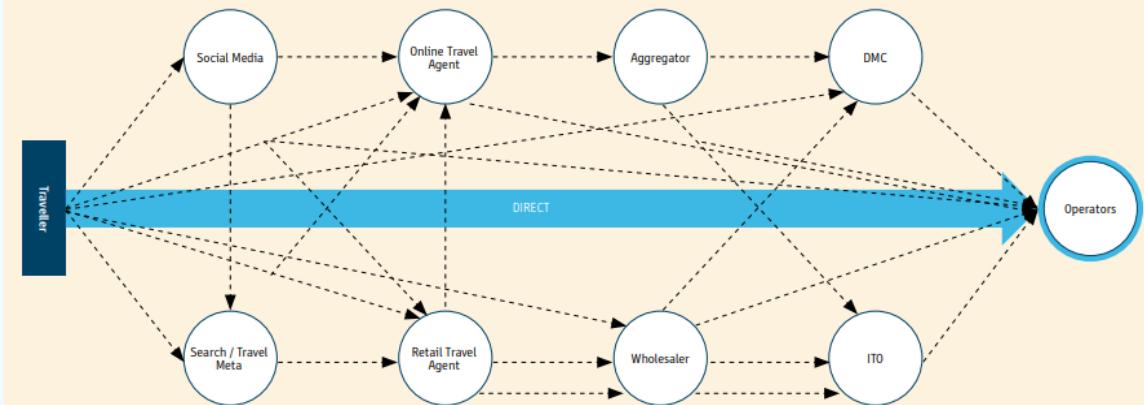
The complexity of Australia can be a barrier which distribution helps to overcome.

A lot has changed over the last few years

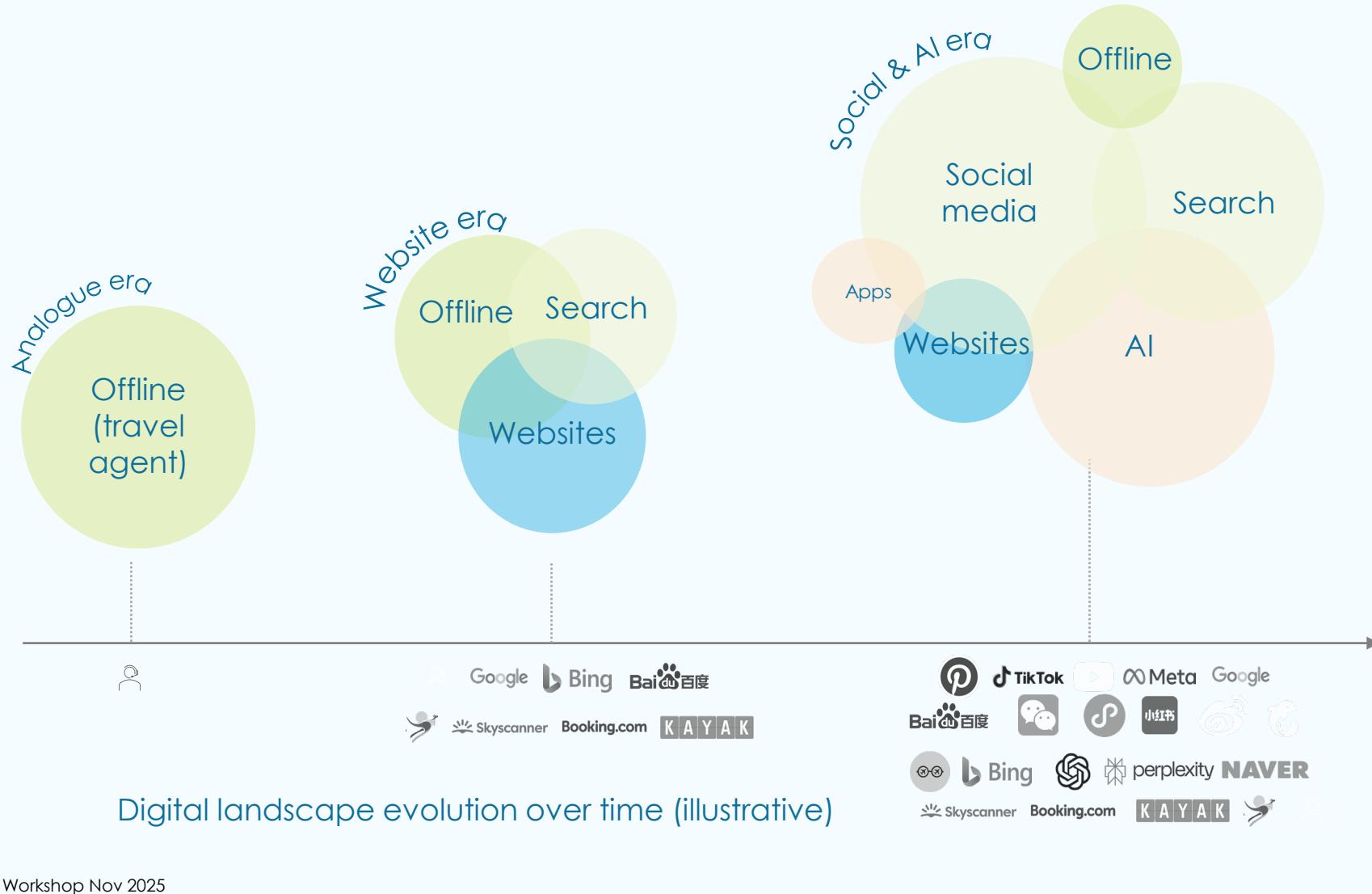
Lead up to the Pandemic



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

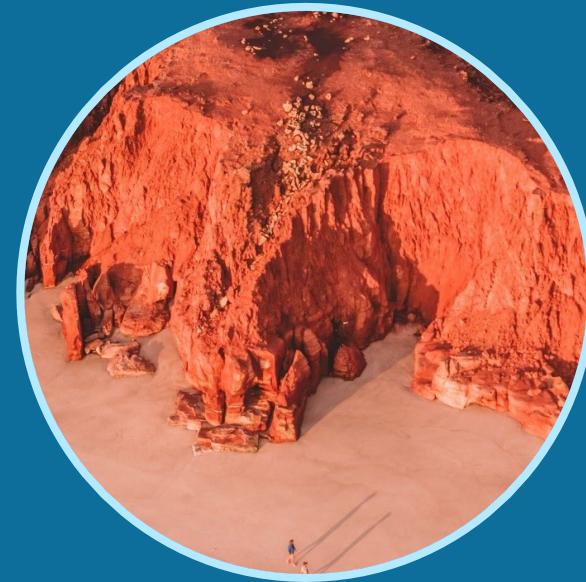
Three consumer needs take precedence



Personalisation
is on the rise

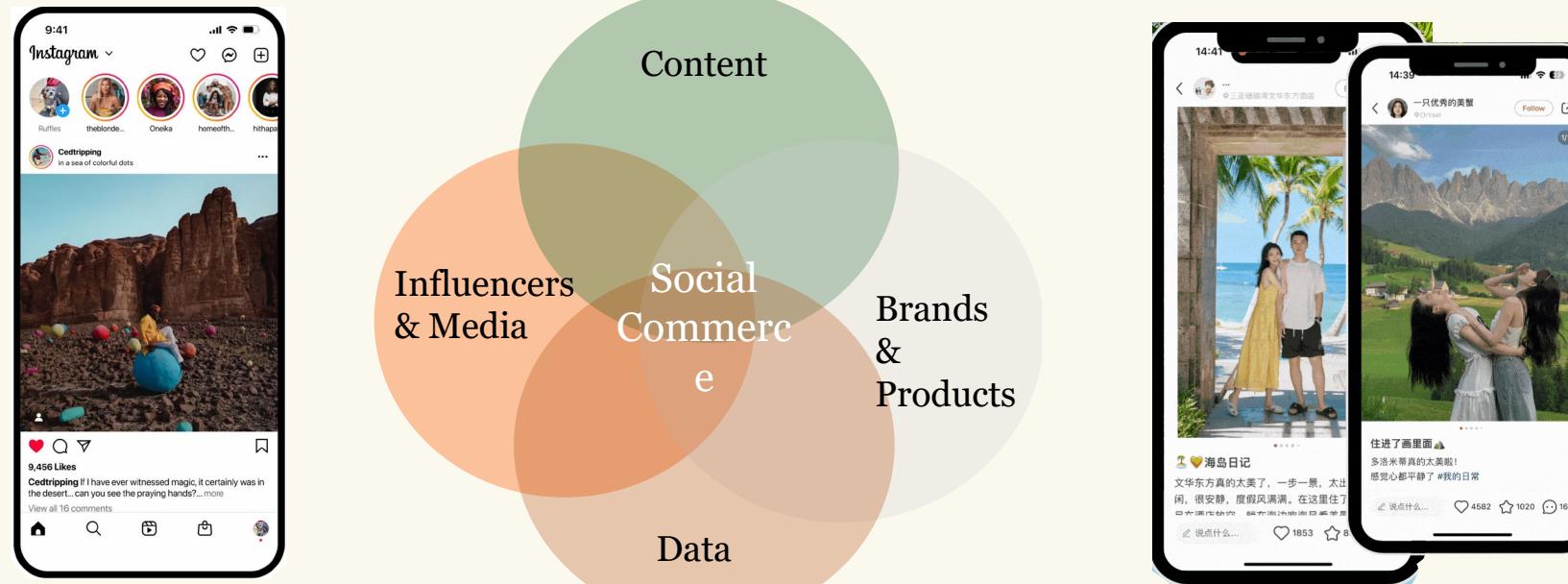


The need for
control is
heightening



Trust has never
mattered more

Social commerce will shift travel trends



Western Market Platforms



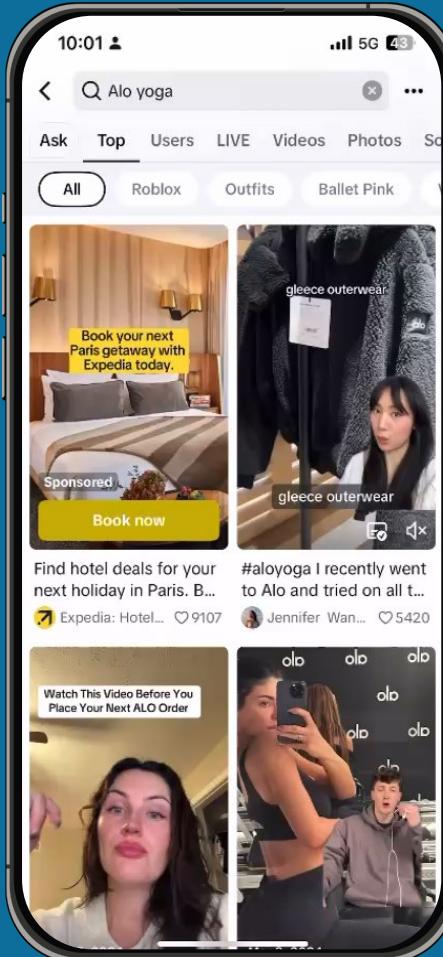
Eastern Market Platforms



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

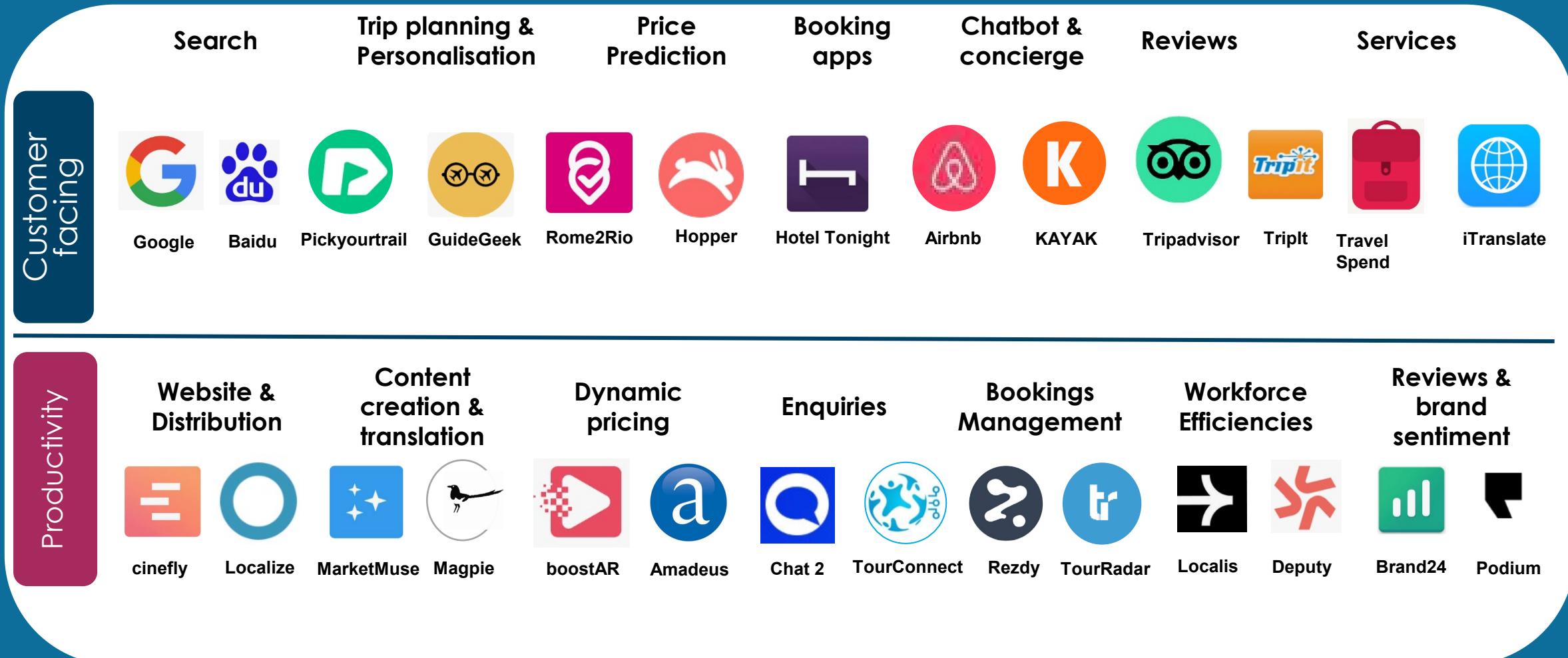
Mega Trend: Rising Expectations

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



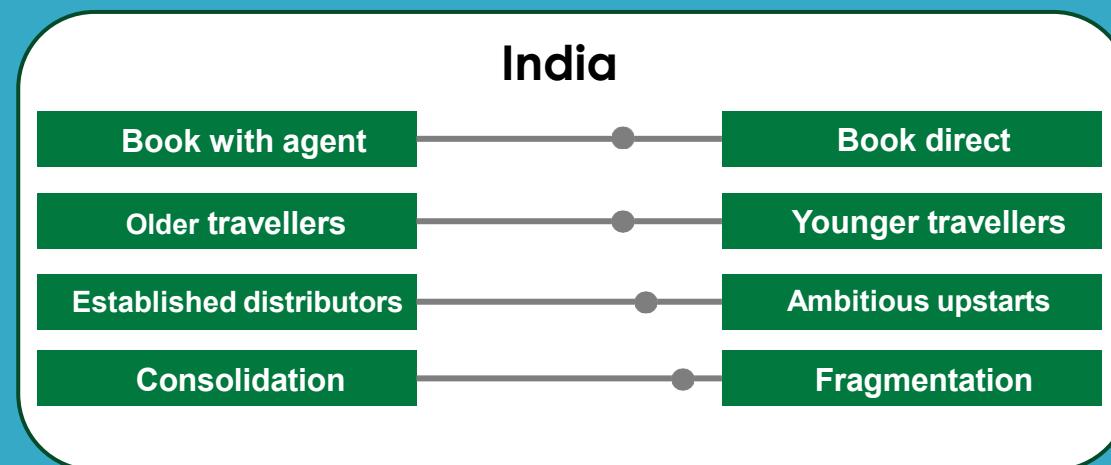
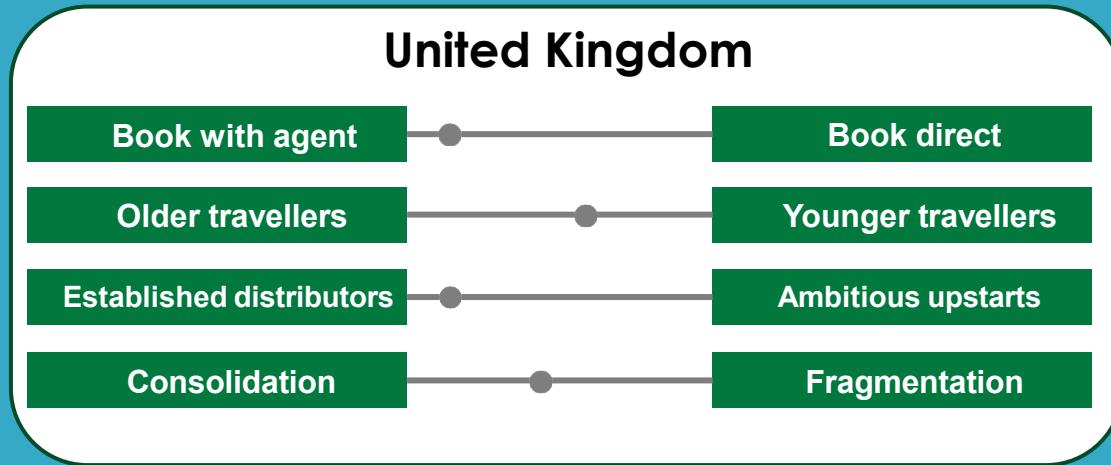
Mega Trend: Tech Democratisation

What operators could consider

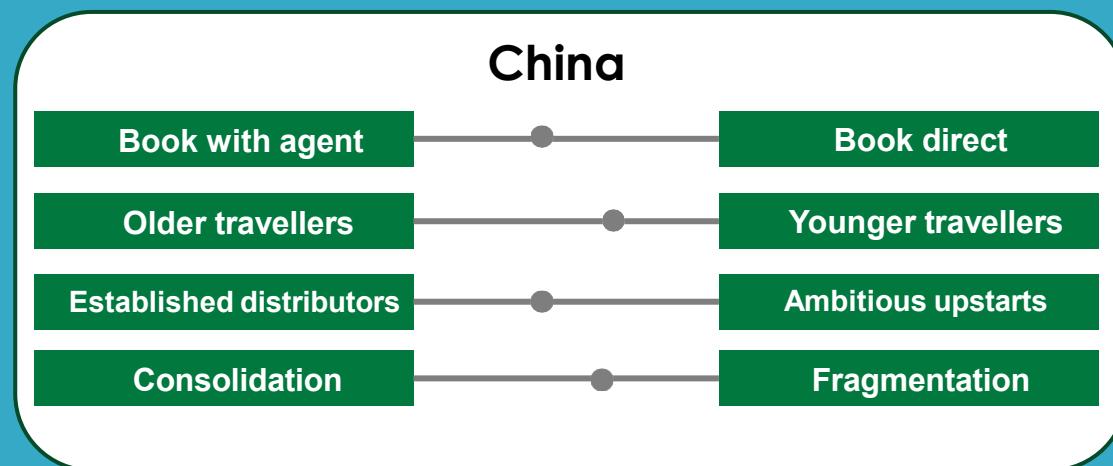
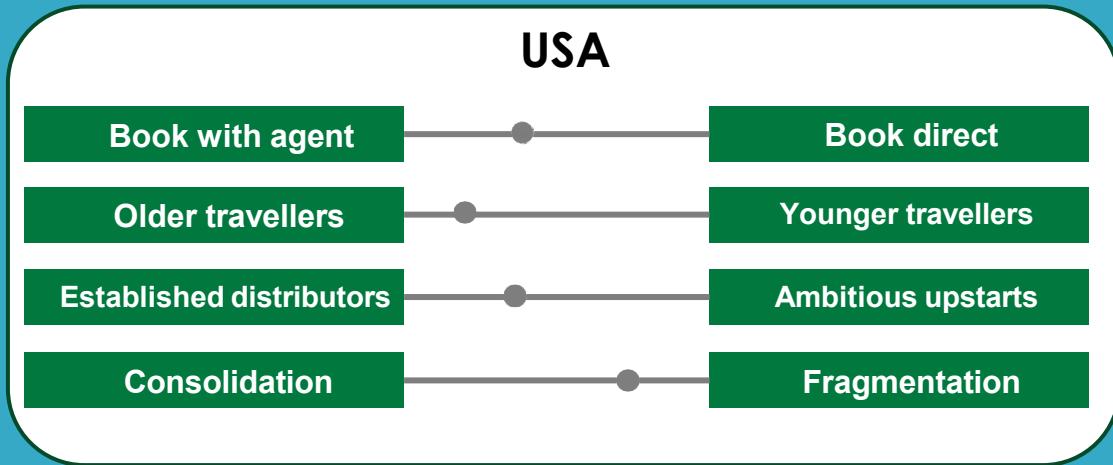
- How are you selecting your technology partners?
- Do you need a data strategy in place?
- Do you use dynamic pricing software?
- Can you enhance your product offerings on your website?
- Are you considering AI tools to enhance routine tasks?

Mega Trend: Complexity Intensifies

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



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

FUTURE OF DISTRIBUTION INSIGHTS REPORT.
2024



Great Barrier Reef, Queensland, Australia

Tourism Australia

Personalisation matters more than ever before

Consumers have come to expect personalisation as a standard offering. 71% of consumers expect personalisation from the brands and businesses they choose and 76% get frustrated when they don't have it.¹

Tailored and bespoke

Travel has seen a shift from experiences to hotel experiences and proliferation of accessible content.

In the current landscape, the ability to offer diverse options and experiences that cater to individual preferences has become increasingly crucial for attracting and retaining customers. 80% of customers are more likely to purchase from a company that offers personalised experiences.²

Riches experience

Personalisation has become a cornerstone of rich and immersive travel experiences, with 65% of consumers indicating offering them targeted personalisation makes them more likely to book. By leveraging data-driven insights and advanced technologies, travel providers can offer experiences that resonate deeply with individual preferences and interests.

Values and taste based

In an era where consumers increasingly seek authenticity and meaningful experiences, personalised travel offerings allow tourists to connect more deeply with their destination. By tailoring experiences to specific cultural and lifestyle preferences, this enables the creation of travel moments that resonate on a personal level, responding to the traveler's core values. Personalisation transforms travel from a generic commodity into an expression of the traveler's identity and aspirations – especially important as many audiences have important cultural nuances to consider.

Importance of personalisation actions for consumers

Action	Importance
Make it easy for me to navigate in-store and online	75%
Give me relevant product recommendations	67%
Tailor messaging to my needs	65%
Offer me targeted promotions	63%
Send me timely communications tied to key moments	58%
Personally address communications to me	54%
Engage and onboard me when I buy for the first time	52%
Offer something just for me	48%
Allow me to customise my holiday	46%
Tell me where I am	44%

1. McKinsey, The value of getting personalization right or wrong is multiplying
2. Deloitte, Connecting with meaning: Hyper-personalizing the customer experience using data, analytics, and AI

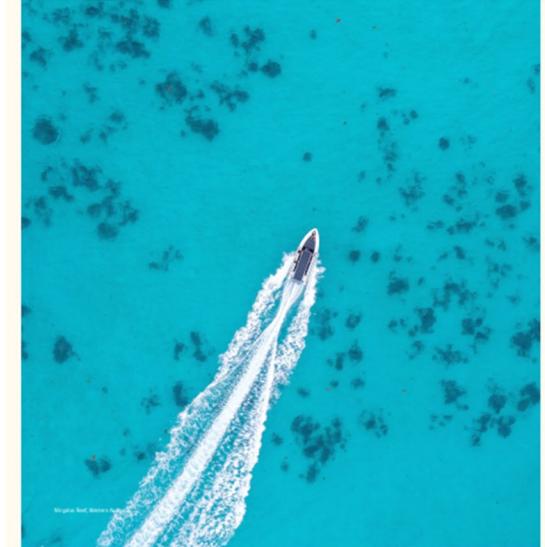
FUTURE OF DISTRIBUTION INSIGHTS REPORT.
Market Profiles



Boat on the water, Queensland, Australia

Tourism Australia

FUTURE OF DISTRIBUTION INSIGHTS REPORT.
Market Profiles



Boat on the water, Queensland, Australia

India

The consumer's travel purchase journey: touchpoints and channel dynamics

Multiple points of influence during planning

Consumers in India are using multiple sources to plan travel. Recommendations from friends and relatives are highly influential in shaping travel choices – almost six in ten rely on recommendations from friends or family when researching and planning travel.

While YouTube, Google and Meta are prominent online sources, consumers also consult multiple websites. The accelerating pace of technological innovation in personalised content will amplify this shift in consumer behaviour.

Planning travel to Australia demands significant time and financial investment given its diversity of destinations and varied climate. Eight out of ten travellers plan most detail ahead of their trip, including ground transport, places to visit and accommodation.

Preference for using a variety of channels to book

India's travel consumers are more inclined to consult a range of platforms for travel research and booking, with 42% booking using a multi-channel approach when it comes to booking.

Compared to other key source markets, Indian out-of-home travellers are more inclined to book travel directly with travel agents, with 35% travelling this way. Rather, they are more likely to book various aspects of their trip through online travel marketplaces (e.g. Hotels.com, Booking.com) and travel agents.

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What travellers do in Australia

While travellers to Australia are primarily from the state of Indian holiday visitors and flights with travel agents (both person and online). Post-pandemic, Indian travellers are increasingly comfortable booking flights online, with this share tripling from 20% in 2019 to 60% in 2024. Despite this, travel agents remain an important booking channel, handling 34% of air bookings for Indian holiday visitors to Australia.

Travel research and planning sources

Source	Percentage
Search engines	68%
Social media	61%
YouTube	58%
Travel websites	56%
Meta	54%
Booking.com	53%
Hotels.com	51%
Travel agents	48%
Friend or family	47%
Other	46%
Travel forums	45%
Travel guides	44%
Instagram	43%
Facebook	42%
Twitter	41%
Travel blogs	40%
Travel vloggers	39%
Travel influencers	38%
Travel forums	37%
Travel guides	36%
Travel blogs	35%
Travel vloggers	34%
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Travel forums	17%
Travel guides	16%
Travel blogs	15%
Travel vloggers	14%
Travel influencers	13%
Travel forums	12%
Travel guides	11%
Travel blogs	10%
Travel vloggers	9%
Travel influencers	8%
Travel forums	7%
Travel guides	6%
Travel blogs	5%
Travel vloggers	4%
Travel influencers	3%
Travel forums	2%
Travel guides	1%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. Q: What sources did you use to research ideas and inspiration for this trip?

Level of planning

Level of planning	Percentage
In destination	30%
International destination	28%
Domestic destination	26%
Domestic travel	22%
International travel	18%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. Q: How planned were the following aspects of this trip?

Travel booking methods, all out of region travellers

Method	Percentage
Direct to airline	55%
Direct to accommodation	48%
Direct to travel agent	42%
Travel agent / travel operator	38%
Travel agent / tour operator	35%
Travel agent / tour operator	32%
Travel agent / tour operator	30%
Travel agent / tour operator	28%
Travel agent / tour operator	25%
Travel agent / tour operator	23%
Travel agent / tour operator	21%
Travel agent / tour operator	19%
Travel agent / tour operator	17%
Travel agent / tour operator	15%
Travel agent / tour operator	13%
Travel agent / tour operator	11%
Travel agent / tour operator	9%
Travel agent / tour operator	7%
Travel agent / tour operator	5%
Travel agent / tour operator	3%

Source: Tourism Australia, Consumer Demand Project, Jan to Mar 2024. Q: What of the following options did you use to book the different aspects of your trip?

Booking sources for airfares, visitors to Australia

Source	Percentage
In person with travel agent	51%
Online travel agent	40%
Online travel operator	38%
Travel agent	35%
Travel operator	32%
Travel agent	29%
Travel operator	27%
Travel agent	25%
Travel operator	23%
Travel agent	21%
Travel operator	19%
Travel agent	17%
Travel operator	15%
Travel agent	13%
Travel operator	11%
Travel agent	9%
Travel operator	7%
Travel agent	5%
Travel operator	3%

Source: Tourism Research Australia, International Visitor Survey, Jun 2024. Q: How have you booked your flight?

Tourism Australia

tourism.australia.com/insights

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Information & Insights

Corporate website
tourism.australia.com

Research & Insights
tourism.australia.com/stats

Newsletters
tourism.australia.com/subscribe

Webinars
tourism.australia.com/webinars

Demand Opportunities & Distribution

Key Distribution Partners
tourism.australia.com/marketregions

Trade Events
tourism.australia.com/events

PR, Famils & Social Media
tourism.australia.com/workingwithmedia

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ATDW.com



Working with Tourism Australia Guide
tourism.australia.com/WorkingwithTA



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Thank you!

