



Seasonal Experiences Index: Spring 2025

BIG RED GROUP The Experience
Network.

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Foreword

I'm excited to present Big Red Group's latest Seasonal Experiences Index report, which delves into the trends shaping Australia's travel and experiences industry in Spring 2025.

Drawing on insights derived from over hundreds of thousands served this season, the report paints a picture of sustained momentum for the industry, as the nation gears up for its peak tourism period.

This Spring, there has been a marked change in the way Aussies are experiencing the nation - for instance, romance was in full bloom as Aussies leant into amorous activities - including Picnics (+34%), Wine and Spirits tastings (+18%), Romantic Dining (+15%).

While challenges in the form of regional connectivity and climate resilience continue to persist, demand surged across Australia's second "shoulder season" with travellers taking advantage of quieter crowds and lower prices.

Despite lingering challenges, the tourism and experiences industry continues to show adaptability and strength as operators evolve their offerings with longer-term viability and customer expectations in mind. Big Red Group and our substantial operator network are optimistic for what lies ahead, anticipating further growth and powerful momentum as we charge into 2026 and beyond.

David Anderson

CEO & Co-Founder, Big Red Group

State of the nation's tourism and experience industry



Often seen as a transition season where Australians shake off the winter blues, embrace renewal and gear up for the peak tourism period, Spring 2025 signalled a new era for Australia's tourism and experiences industry. The **arrival of the shoulder season this year** marked a new phase of sustained momentum, with **Spring delivering a +7% year-on-year uptick in booking volume** - the first in nearly three years.

The experience economy blossomed with a renewed air of confidence, helping to build on the year's momentum. Wine & Dine (+21%) and Adventure & Sport (15%) experiences surged, catapulting the nation's tourism and experiences industry toward further growth ahead of 2025 drawing to an end.



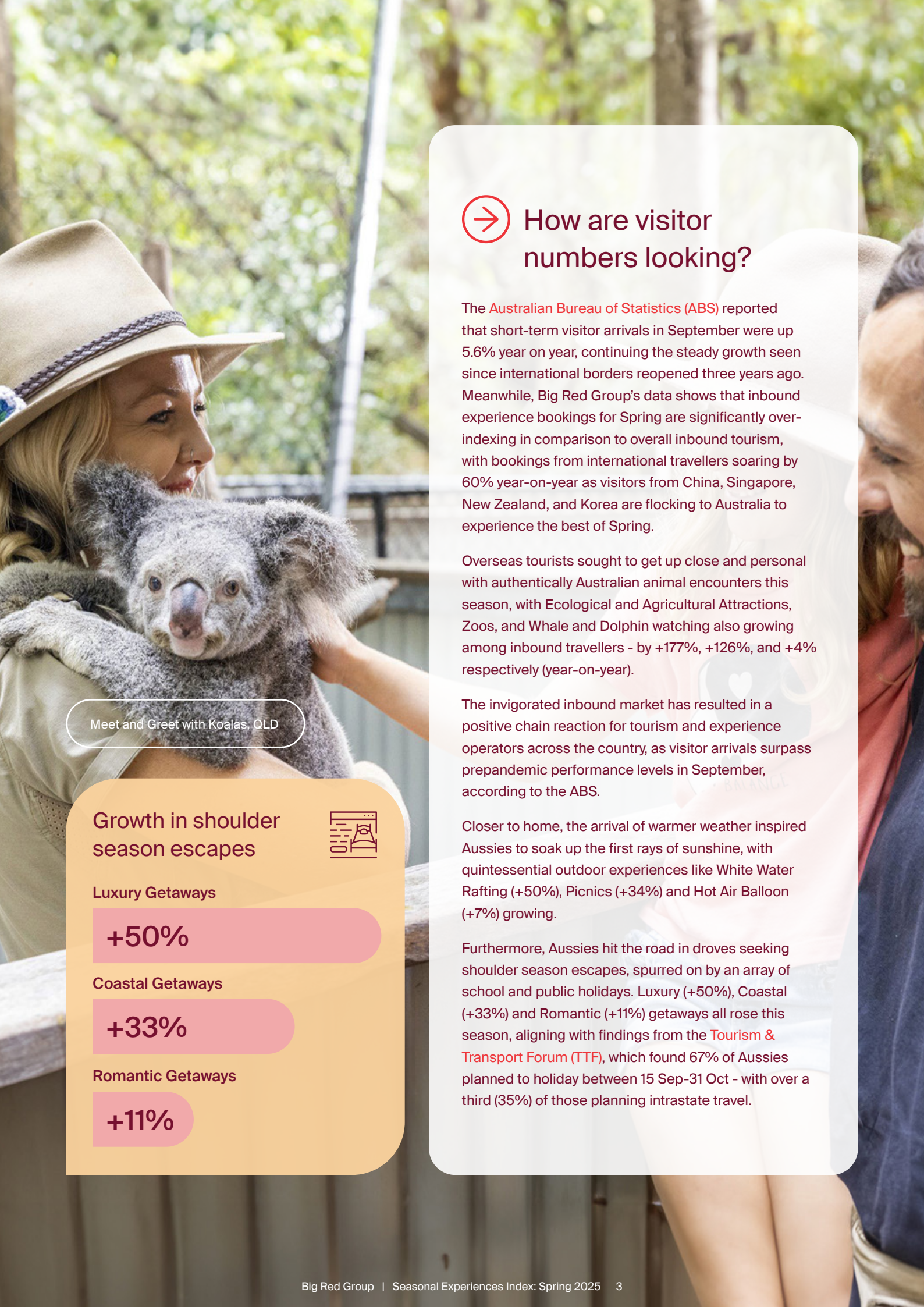
+21%

Wine & Dine



+15%

Adventure & Sport



Meet and Greet with Koalas, QLD

Growth in shoulder season escapes



Luxury Getaways

+50%

Coastal Getaways

+33%

Romantic Getaways

+11%



How are visitor numbers looking?

The **Australian Bureau of Statistics (ABS)** reported that short-term visitor arrivals in September were up 5.6% year on year, continuing the steady growth seen since international borders reopened three years ago. Meanwhile, Big Red Group's data shows that inbound experience bookings for Spring are significantly over-indexing in comparison to overall inbound tourism, with bookings from international travellers soaring by 60% year-on-year as visitors from China, Singapore, New Zealand, and Korea are flocking to Australia to experience the best of Spring.

Overseas tourists sought to get up close and personal with authentically Australian animal encounters this season, with Ecological and Agricultural Attractions, Zoos, and Whale and Dolphin watching also growing among inbound travellers - by +177%, +126%, and +4% respectively (year-on-year).

The invigorated inbound market has resulted in a positive chain reaction for tourism and experience operators across the country, as visitor arrivals surpass prepandemic performance levels in September, according to the ABS.

Closer to home, the arrival of warmer weather inspired Aussies to soak up the first rays of sunshine, with quintessential outdoor experiences like White Water Rafting (+50%), Picnics (+34%) and Hot Air Balloon (+7%) growing.

Furthermore, Aussies hit the road in droves seeking shoulder season escapes, spurred on by an array of school and public holidays. Luxury (+50%), Coastal (+33%) and Romantic (+11%) getaways all rose this season, aligning with findings from the **Tourism & Transport Forum (TTF)**, which found 67% of Aussies planned to holiday between 15 Sep-31 Oct - with over a third (35%) of those planning intrastate travel.



How is visitor spending looking?

The latest insights from the key industry body, **Tourism Research Australia**, point toward robust total tourism consumption within Australia, with total spend measuring at \$8.5 billion as of June 2025, a +32% increase on June 2024 levels.

This upward trajectory appears to be just the beginning with the **World Travel & Tourism Council (WTTC)** anticipating an era of unprecedented growth for the nation's travel industry, with international tourism consumption forecasted to exceed \$52 billion by 2035. On the domestic visitor front, spending is projected to approach \$221 billion, pointing to a sustained recovery of Australia's visitor economy.

Despite an air of confidence for discretionary spending last season, consumers appeared to exhibit slight caution in Spring, with minimal gains for household spending reported by Westpac. The company's latest **Household Spending Indicator Bulletin** shows a 0.1% increase in discretionary spend - with upticks seen predominantly in travel and accommodation services.

Big Red Group data showed a comparable trend, indicating that while the overall volume of Spring bookings was up +7% year-on-year, average order value (AOV) relaxed. This demonstrates that while consumers maximised their purchasing power by acquiring a greater volume of experiences, they optimised their budget. However, Father's Day helped stimulate a +5% boost for experience gifting brand, **RedBalloon**, as Aussies sought stories over stuff for the father-figure in their lives.

+32%

Total tourism
consumption within
Australia

\$8.5 billion as of June 2025

+511%

Forecasted increase in
international tourism
consumption

By 2035

+5%

Increase in Spring
experience bookings

At RedBalloon





What does this mean for the experience industry?

Australia's tourism and experiences industry exhibits strong momentum fueled by a surge in international arrivals and renewed appetite among Australians wanting to explore their own backyard. Even with a mindful spending trend ahead of peak holiday seasons, the sector is expected to finish strong in 2025.

While surges in inbound and domestic tourism are helping propel the industry forward, it has facilitated unique challenges in the form of infrastructure strain, limited regional connectivity and growing overtourism concerns. Additionally, operators continue to face external factors such as unprecedented rainfall and ecological disasters like algal blooms, which require long-term strategies to resolve.

Solving these strategic pressures is paramount to unlocking the industry's future and helping transform today's momentum into sustainable growth, allowing our tourism and experience operators to blossom.



INDUSTRY INSIGHT



John Boris, President & Chief Growth Officer at Big Red Group, said:

“

Spring 2025 saw the Australian tourism and experiences industry move beyond recalibration to establish sustained momentum. This renewed strength continues to be underpinned by surging inbound visitation and domestic demand, driven by a clear market shift toward high-value experiences - memories of which linger long after they're over.

While our industry and its operators appear to be primed for a successful 2026 - there is work to be done in terms of ensuring we're able to take further advantage of the upward trend. The industry as a whole must act to address the long-standing challenges posed by economic headwinds and uncertain weather climates. Proactive, long-term action will help guarantee the long-term success of the entire sector.

”



Experience hotlist from Spring 2025



Spring 2025 marked a turning point in Australia's travel calendar, with experience bookings rising year-on-year for the first time since Summer 2022. As Aussies received a reprieve from the cold with temperatures warming up, the shoulder season offered ample opportunity to combine the allure of the sun with markedly lower prices and fewer crowds.

Family-friendly attractions such as Aquariums and Zoos (+186%) saw exceptional growth, reflecting travellers' choices for meaningful experiences that appeal across generations. Equally notable was a rise of sensory-driven travel, as visitors explored regional craft beverages and culinary experiences. Beer & Spirit bookings surged by +89 %, alongside Wine & Spirits Tastings (+18 %) and Culinary Classes (+31%), signalling a growing appetite for social experiences.

Spring proved particularly appealing as Aussies optimised travel before rising summer temperatures and dry conditions. Across prominent holiday destinations in New South Wales, Victoria and Queensland, temperatures were well above average according to the [Bureau of Meteorology](#).

Additionally, New South Wales experienced its **lowest rainfall** since October 2019, which encouraged visitors to embrace outdoor activity, before the above-average **temperatures and rainfall forecasted** for Summer.



+89%
Beer & Spirits Tasting



+18%
Wine & Spirits Tastings



+31%
Cooking Classes

Best selling categories in Spring 2025

by booking volume, compared to the previous year:

- | | | | |
|------------|--------------------------|------------|------------------------------|
| 01. | Theme Parks | 06. | Scenic & Dining Cruises |
| 02. | Culinary Experiences | 07. | Wine & Spirits Tasting |
| 03. | Aquarium & Zoos | 08. | Hot Air Ballooning |
| 04. | Whale & Dolphin Watching | 09. | Jet Boating & Jet Packs |
| 05. | Reef & Island Cruises | 10. | Sightseeing & Cultural Tours |

Theme parks continue to maintain their lead season after season, reinforcing their strong appeal among domestic and international visitors alike. Culinary experiences rose to the second best-selling category with +24% year-on-year growth in bookings, while whale & dolphin watching slipped slightly. This season saw some new entrants in the hotlist, including scenic and dining cruises, wine and spirits tasting, as well as interest in jet boats and jet packs, showing traveller preferences are shifting towards experiences that blend adventure and indulgence.

+24% YoY
Culinary Experiences



+18% YoY
Wine & Spirits Tasting



+186% YoY
Aquarium & Zoos



+7% YoY
Hot Air Ballooning

A state-by-state overview for Spring 2025



	Experiences Booked Spring 2024* for reference	Experiences Booked Winter 2025** for reference	Experiences Booked Spring 2025***
ACT	-2.4%	+23.9%	+24.4%
NSW	-16.4%	+1.6%	+17.1%
NT	+4.2%	-11.8%	+4.2%
QLD	-18.5%	-14.2%	-7.0%
SA	-5.8%	+3.4%	+16.5%
TAS	-32.0%	-21.6%	-3.3%
VIC	+0.1%	+14.9%	+38.1%
WA	-15.8%	-5.3%	+7.0%

* Experience booking data for Spring 2024 inclusive of 1 Sep - 30 Nov 2024

** Experience booking data for Winter inclusive of 1 Jun - 31 Aug 2025

*** Experience booking data for Spring 2025 inclusive of 1 Sep - 3 Nov 2025



Big Red Group's booking analysis

Spring delivered a strong boost to bookings across most of the country, particularly in New South Wales and Victoria. The uptick shows Aussies shaking off the winter blues to explore our backyard in record numbers.

- Victoria had a standout season - growing by +38% year-on-year - to finally close the gap between rival New South Wales, overtaking as the nation's second biggest tourism state, according to overall experience bookings.
- Booking numbers continued to bloom across the Australian Capital Territory (ACT) and South Australia, while Western Australia and the Northern Territory made gains following booking numbers waning for consecutive seasons.
- After experiencing modest growth in Winter, New South Wales surged by +17% thanks to Aussies flocking to waterside destinations including Lower North Shore, Sydney Harbour and the Eastern Suburbs.

While numbers in Tasmania and Queensland continued to waver, these key destinations showed great resilience by scaling back on losses seen in previous seasons, indicating recovery.



Beachside Hot Tub Villa Getaway, TAS

→ State-based highs and lows for Spring

ACT



Spring 2024: -2.4% | Winter 2025: +23.9% | Spring 2025: +24.4%

The tourism and experiences industry in the ACT maintained its momentum for the third consecutive season, achieving a +24.4% increase in bookings year-on-year for Spring. North Canberra was the standout performer, experiencing a 35% surge owing to increased demand in Hot Air Ballooning and High Tea. The bright spot comes amid a lull in booking numbers in the south of the CBD.



OPERATOR SPOTLIGHT

Ben Jarrett, Managing Director at Contentious Character which operates a Premium Wine Tasting Experience in Fyshwick, through RedBalloon, said:



Although it has been a challenging season for the hospitality and wine industries, we've been encouraged by the strong demand for our bookable experiences. Travellers are increasingly seeking meaningful, immersive moments, and our curated tastings, paired experiences, and Urban Winery events have continued to resonate.

Those who are visiting are arriving with greater intent and a willingness to plan ahead, which has translated into higher conversion across our bookable offerings. This highlights the broader shift in appetite for experience-led tourism across the Canberra region - both within our Urban Winery and through the many partner events we support throughout Canberra and its surrounds.



Premium Wine Tasting Experience, ACT

NSW



Spring 2024: -16.4% | Winter 2025: +1.6% | Spring 2025: +17.1%

NSW experience bookings surged this Spring, growing by +17.1% year-on-year as the harbour city came alive as warmer weather arrived. There was a marked shift in Sydneysiders visiting harbourside destinations, with Lower North Shore (+707%), Sydney Harbour (+245%) and the Eastern Suburbs (+11.3%) rising thanks to an uptick in zoo visits and dining, helping lead the charge.

Further afield, the Blue Mountains saw a huge increase, with experience bookings in the region up a staggering +960% owing to a rise in inbound visitors. However, key coastal destinations like Kiama and Port Stephens dipped by -50%, while Shoalhaven saw a marginal decline (-4.4%) despite each being a key whale-watching hotspot.

NT



Spring 2024: +4.2% | Winter 2025: -11.8% | Spring 2025: +4.2%

Encouragingly, the Northern Territory saw a +4.2% year-on-year increase this season, with the Territory's Top End emerging as a top performer, helping bookings to climb for the first time in three consecutive seasons. Activity bookings in Darwin rose by +25% respectively, driven by demand for evening dining cruises and other hospitality experiences.

Key hotspots like Katherine and Alice Springs pulled back slightly on the dips experienced last season, as visitor numbers naturally softened in line with the destination's unique weather seasons.



OPERATOR SPOTLIGHT

Chris Osborne, Group Director of Sales at Dreamworld, which offers multi-day passes through Experience Oz said:

“

Dreamworld experienced positive momentum through Spring 2025, underpinned by strong interest in our newest attractions from both local and visiting audiences. Despite a brief interruption from the early-season cyclone, guest sentiment remained strong, supported by the positive response to our updated offerings and our ongoing investment in the Gold Coast.

”

Day Dreamworld Passes, QLD

QLD



Spring 2024: -18.5% | Winter 2025: -14.2% | Spring 2025: -7.0%

Queensland - Australia's biggest tourism state - continues to show resilience as it bounces back from prolonged periods of extreme weather that hit the state earlier this year, lessening losses to -7.0%.

Reassuringly, bookings in destinations hardest hit by ex-cyclone Alfred, such as Main Beach (+265%) and Surfers Paradise (+125%), show promising uplifts this season, demonstrating a return in consumer confidence for the holiday hotspot. There was also a marked increase in the inner west and northern suburbs of Brisbane which made gains, growing by +24% and +21% respectively.

Further north, activity bookings climbed in Cairns (+83%) and Port Douglas (+110%) as Aussies sought the early-season sun, capitalising on the region's tropical temperature. Yet, it wasn't all blue skies with bookings across the Sunshine Coast Hinterland (-63%) and Noosa (-26%) experiencing declines.

SA



Spring 2024: -5.8% | Winter 205: +3.4% | Spring 2025: +16.5%

Unprecedented algal blooms off South Australia's coast saw softer bookings in hotspots like the Eyre Peninsula (-45%) and Kangaroo Island (-15%), yet the overall state proved resilient, with bookings up by +16.5%.

Central locations like Adelaide City (+23%) and Southern Adelaide Regions (+14%) delivered significant gains, however, it was Adelaide Hills (+57%) that was a standout this season, with Golding Wines helping to contribute to a rise in wine and spirits tastings (+18%) at a national level.

It was a different story in the Barossa who appeared to miss out on some of the tourism share this season as bookings in the region dipped by a third this Spring. Shrinkages were also seen to the west of the CBD (-77%), which underwent a decline this season.



OPERATOR SPOTLIGHT

Cassandra Wilson, Tourism Manager at National Wine Centre of Australia which operates the Guided Discovery Tour in Adelaide through RedBalloon, said:

“

We're seeing a similar trend as the rest of the state's tourism sector, where visitation levels are down, yet those who are visiting are spending more on experiences. As a result we have increased our involvement in marketing campaigns and event activations to broaden our visibility in the hope of increasing sales during this lower visitation trend.

From these efforts, we've already had a strong start to peak season with increased revenue levels on 2024 figures, and we are hopeful this will continue into Summer.

”

National Wine Centre of Australia
Guided Discovery Tour, SA

TAS



Spring 2024: -32.3% | Winter 2025: -21.6% | Spring 2025: -3.3%

While experience bookings in Tasmania continue to fluctuate, Australia's most southern state appears to be on a trajectory toward recovery, minimising losses to -3.3%.

Despite declines being seen across typical tourism destinations including Hobart (-58%) and Devonport (-19%), these were offset by gains in Tasmania's West Coast (+94%), the Forestier Peninsula (+60%) and Central Highlands (+47%) regions- owing to an upswing in demand for cruises, with World Heritage Cruises contributing to that growth in the West Coast.

VIC



Spring 2024: -0.1% | Winter 2025: +14.9% | Spring 2025: +38.1%

After gaining ground over the course of the year, Victoria has toppled northern neighbour, New South Wales, to become Australia's second largest tourism state - as bookings skyrocketed by +38.1% in Spring. The state's exponential growth came from key areas including the Yarra region (+34%) and the inner-city suburb of Stonnington (+28%), which built on their growth from Winter.

The Mornington Peninsula continued to act as a key tourism driver as bookings increased by +13% - thanks to ongoing swings toward wellness (+33%) activities - however, renowned spa spot, Daylesford, received renewed interest this season, posting a +7% uptick.

Regional Victoria experienced slippages as Gippsland (-42%) and the Bellarine Peninsula (-18%) underwent declines, while the Yarra Ranges and Geelong also softened slightly by -7% and -2% respectively.



OPERATOR SPOTLIGHT

Graeme Skeggs, Director of Sales and Commercial Partnership at Pinnacle Travel Group, which operates several experiences in Western Australia, through RedBalloon, said:

“

While Winter was a challenge, our legacy products fared very well with Rottnest and tours to the Pinnacles operating on high loadings, and even Wave Rock saw an uptick due to the cooler weather. The whole group saw a huge uptake in traditional FIT bookings with numbers up 15-20% for niche products like Whale Watching and Lancelin 4X4, aided by our partnerships with BRG, the mild weather and increased awareness of Western Australia. Our high-speed Rottnest Ferry services and Rottnest touring have seen the biggest increase, with a 5% increase in ferry market share against our competitors due to strategic partnerships with traditional and online agencies. With a summer of Cricket, events and warming weather, we are extremely optimistic for 2026, beating all records.

”

Lancelin 4WD and Sandboarding Adventure, WA

WA



Spring 2024: -15.8% | Winter 2025: -5.3% | Spring 2025: +7.0%

At long last, bookings in Western Australia have finally stabilised and gone on to surge by +7.0% this season. Perth City continues to drive bookings in terms of volume, thanks to continued demand for dining, picnic and cruise experiences which helped the region to +22% growth.

Bookings in Hillarys saw a massive +587% upswing this season, fuelled by travellers flocking to the hub for top experiences like the Aquarium of Western Australia and Rottnest Island cruises - replicated in a wider drive in demand for Aquariums and Reef and Island Cruises among Aussies.

Mapping Australia's experience demand

Australians stepped into Spring 2025 with a renewed sense of curiosity to explore and rediscover the beauty of their own backyard. This season, travellers balanced the buzz of cultural hubs with the serenity of nature escapes, driving strong momentum across destinations nationwide.

Gold Coast has taken out the title of Australia's top experience destination this season, edging out Melbourne, while far north Queensland's coastal icons and New South Wales' scenic retreats continued to capture travellers' attention.

From city sophistication to tropical ease, these top 10 destinations capture the spirit of Spring travel.



Australia's top 10 experience destinations this season

01. Gold Coast, QLD
02. Melbourne, VIC
03. Sydney, NSW
04. Cairns, QLD
05. Mornington Peninsula, VIC
06. Port Douglas, QLD
07. Brisbane, QLD
08. Blue Mountains, NSW
09. Hunter Valley, NSW
10. Adelaide, SA



/ Gold Coast, QLD



/ Mornington Peninsula, VIC



/ Adelaide, SA



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 20 years.



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 4.6 stars from 150,000 customer reviews.



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