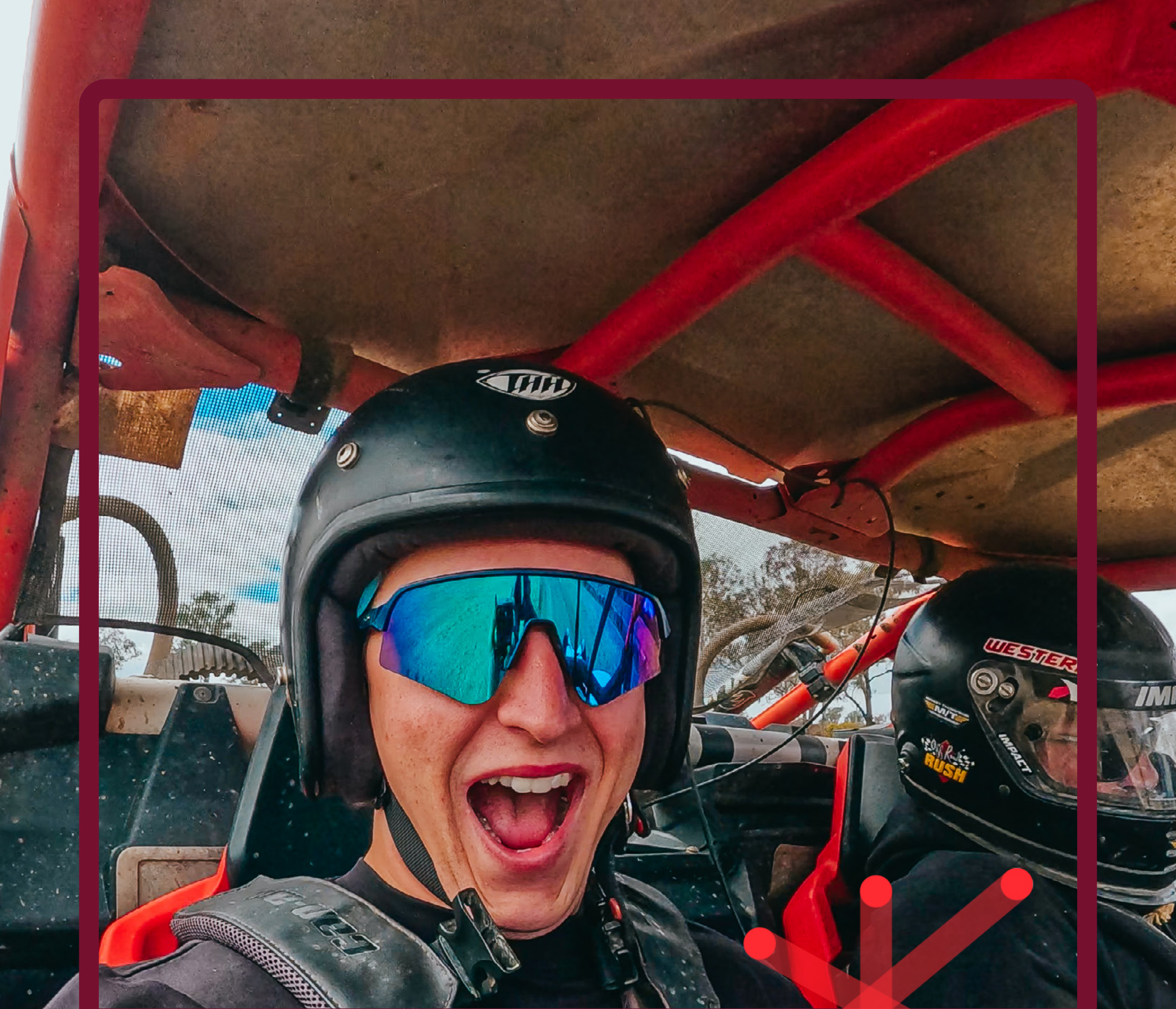


Seasonal Experiences Index: Autumn 2025

BIG RED GROUP
The Experience Network.

Contents

Foreword

On behalf of all at Big Red Group, I'm pleased to share our latest Seasonal Experiences Index, which reflects the travel and experience economy during Autumn 2025.

Drawing on insights from close to 200,000 experiences that were served, this report provides timely insights into how Aussies are experiencing the nation. From the requirement for climate resilience to the rise in curated culinary hubs - which reflects increased demand for wine and dine experiences beyond the traditional peak seasons.

Having completed our first shoulder season of 2025, booking numbers are telling a slightly different story for the nation's tourism and experiences industry than years gone by. Domestic and international travellers alike have embraced cooler weather and changing landscapes, with demand for unique and authentic experiences remaining strong as travellers continue to seek value beyond a monetary figure.

Despite ongoing economic challenges, operators nationwide have demonstrated remarkable resilience and agility this season - and we'll continue to offer our support to ensure their growth.

For now though, we hope this snapshot of Autumn 2025 offers valuable insights into the state of Australia's tourism industry and where it's headed for the remainder of the year - we remain hopeful that there are still marked improvements yet to come.

David Anderson
CEO & Co-Founder, Big Red Group

State of the nation's tourism and experience industry

Autumn 2025 has been anything but predictable for Australia's tourism and experiences industry, as global market uncertainty, evolving consumer behaviour, and extreme weather events continue to define and reshape the industry.

How are visitor numbers looking?

The latest insights from The Australian Bureau of Statistics (ABS) on inbound tourism continue to give cause for optimism, up 8.1% YOY. Big Red Group's own data shows 6% growth on Autumn 2024. On a domestic front, new data from Roy Morgan has revealed 57% of Aussies are planning a domestic trip in the next 12 months, up 5% year-on-year (YOY).

The trend toward local getaways was strong this season, as Aussies made the most of back-to-back public holidays in April, seeking greater value for money in the face of volatile international currency rates and wider market conditions.

While the upward trend is highly encouraging, there is still much work to be done to ensure momentum continues, particularly as uncertainties, in the form of economic pressures and extreme weather events, continue to impede the industry's full recovery.

How is visitor spending looking?

Insights from TRA's 'Visitor Economy Facts and Figures - May 2025' report encouragingly indicate that total tourism consumption in Australia is on the rise, with projected visitor spend on track to hit $183.6 billion by the end of 2025 (+32.6% from 2019).

This is likely attributed to top markets like China and India driving a surge in inbound tourism, with visitor numbers from Singapore and the United Kingdom also steadily increasing.

+32.6%

Projected visitor spend growth by end of 2025

+8.8% YOY

RedBalloon AOV growth

+4.5% YOY

Experience Oz AOV growth

While cost-of-living pressures continue to persist, we're seeing a subtle yet pivotal shift in consumer behaviour as Aussies seek to spend on items and activities that offer value beyond the purchasing price.

CommBank's Household Spending Insights (HSI) Index showed modest gains across recreation (+1.4 per cent) and hospitality (+1.2 per cent) in March, demonstrating that while Aussies are making cutbacks in some areas, they're also making trade-offs to prioritise discretionary spend.

Big Red Group data also attests to this trend, with average order value (AOV) for RedBalloon (+8.8% YOY) and Experience Oz (+4.5%) up in Autumn 2025.

What does this mean for the experience industry?

With discretionary spend holding steady and inbound and domestic tourism remaining strong - and forecasted by Tourism Research Australia (TRA) to grow in 2026, operators are well-placed to capitalise on the rising demand from Aussies eager to spend on meaningful experiences. Further indicators suggest there is greater cause for optimism, with recent rate cuts a step in the right direction for improving consumer sentiment and demand in Q4.

However, it is not all smooth sailing with enduring issues such as glaring gaps in regional accessibility and climate vulnerability still very much impacting day-to-day tourism operations. Such issues require long-term investment and attention for the thousands of Aussie tourism operators to truly bounce back - and we're ready to support and advocate for those operators on this.

Experience hotlist from Autumn 2025

For many experience operators, the Autumn season represents the chance to attract travellers looking for great experiences without the peak-season price tag, helping to bridge the gap in the shoulder season - with travellers further motivated by public holidays and school breaks.

With research from the Tourism & Transport Forum (TTF) finding that 71% of Aussies planned to getaway between 15 March and 15 May this year, the Autumn months offered a final opportunity for travellers to soak up some sun before the winter chill sets in - and also embrace the experiences on offer closer to home.

In great news, some categories saw strong returns from Aussies' appetite to travel, with our fastest-growing categories including:

As ever, the country experienced a 'mixed bag' in terms of weather this Autumn - as southern cities experienced unusually warmer temperatures, with Victoria recording its hottest autumn on record according to the Bureau of Meteorology. Conversely, Autumn rainfall was +30% above average, particularly across Queensland, Northern Territory, as well as large parts of New South Wales.

Despite the perceived washout, outdoor activities continued to shine once again, laying claim to the top spots.

Best selling categories in Autumn 2025 by booking volume, compared to the previous year:

01. Theme Parks

02. Eating Out

03. Scenic Cruises

04. Reef Island Cruises

05. Zoos

06. Hot Air Ballooning

07. Scenic & Dining Cruises

08 Wine & Spirits Tasting

09. Sightseeing & Cultural Tours

10. Spas

What do the bestsellers tells us?

Although Queensland theme parks faced a 95% drop in bookings in the wake of Ex-Cyclone Alfred, according to Big Red Group data, the category held onto top spot in the top-selling categories.

However, the new season saw Hot Air Ballooning and Sightseeing & Cultural Tours rise into the hotlist as travellers sought out memorable and more meaningful experiences.

A state-by-state overview for Autumn 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 Autumn experience market.

	Experiences Booked Autumn 2024* for reference	**Experiences Booked Summer 2025**** for reference	**Experiences Booked Autumn 2025*****
ACT	+0.1%	-2.4%	+20.6%
NSW	-26.8%	-11.2%	-5.3%
NT	-35.1%	-23.1%	-5.1%
QLD	-39.7%	-38.4%	-37%
SA	-0.08%	+4.4%	+16.8%
TAS	-30.7%	-33.1%	-22.5%
VIC	+14.0%	+0.9%	+23%
WA	-25.5%	-11.8%	-8.1%


Wodonga F1 Style Race Car Ride, VIC

Big Red Group's booking analysis

Delving further into the data, we see varied booking patterns - with strong gains delivered in some states offset by quieter periods in others. These contrasting results this season aren't unexpected owing to Australia's diverse landscape, mixed climate, and successive public holidays.

- Victoria and South Australia continued their upward trajectory as record-breaking visitor numbers for special events like Melbourne Formula One Grand Prix and AFL Gather Round assisted the states in posting strong growth numbers.

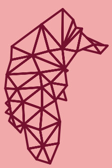
- ACT was a welcomed standout this season, with the nation's capital experiencing a remarkable surge +20.6% YOY.

- Nominal gains were seen for QLD, NSW, NT in comparison to Summer bookings - as the states and territory dealt with weather-related disruptions throughout Autumn.

With data showing that certain destinations continue to miss out on reaping the benefits of 'direction of travel' in terms of experience booking, particularly in Western Australia and Tasmania, it's clear to us that there is work to be done to ensure balanced tourism spread.

State-based highs and lows for Autumn

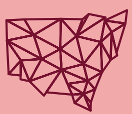
ACT



Autumn 2024: 0.10% | Summer: -2.4% | Autumn 2025: 20.6%

The country's capital has defied the odds this season, pulling back from stagnant booking numbers to achieve considerable growth in Autumn. With Tuggeranong (+53%) and North Canberra (+6.1%) both up, assisting the ACT in its upward surge. However, it wasn't a clean sweep across the territory with Gungahlin (-57.1%) and Molonglo Valley (-44.2%) dipping YOY.

NSW

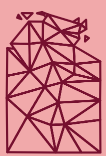


Autumn 2024: -26.84% | Summer: -11.2% | Autumn 2025: -5.3%

NSW minimised its losses that were seen in Summer 2024 figures. Despite a +43.2% uptick in special events & celebrations cruises, potentially owed to VIVID Sydney bookings, inner city bookings dipped by -22.6% overall. However, Sydney's western suburbs told a different story - with experience bookings in Rouse Hill (+157.1%), Penrith (+137.9%) and Chatswood (+46.2%) all up.

Looking further afield, Upper Hunter Valley (-47.8%) and Port Stephens (-45.9%) experienced a weaker season, yet the Snowy Mountains (+230.2%) posted the highest growth on Autumn 2024 as the region's snow season kicked off earlier than expected.

NT



Autumn 2024: -35.18% | Summer: -23.1% | Autumn 2025: -5.1%

After a dip in Summer, the Northern Territory appears to be on the road to recovery as it emerges from its' wet season, with bookings returning slowly, but surely. Daly - Tiwi - West Arnhem region has posted +12% growth - the most significant gain for the Territory this season. Darwin's outer suburbs also experienced modest gains following Summer, up +5.6%, despite city experiences declining by -21.1%.

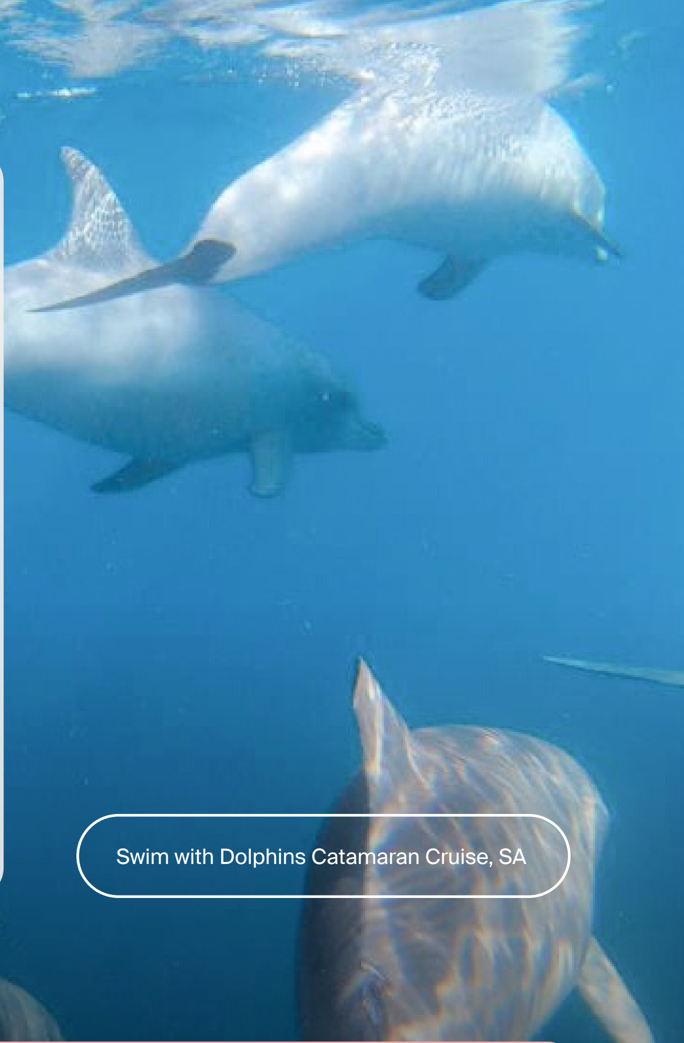
Further south, bookings for Katherine waned, down in Autumn by -52.7% as the destination's off season continued, whereas Alice Springs saw a 3.8% jump in bookings.

Outback and City Tour - Alice Springs, NT

OPERATOR SPOTLIGHT

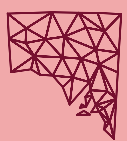
Kayla Webb, Business and tourism operations manager at Temptation Sailing which operates the Wild Dolphin Tour in Glenelg, through RedBalloon and Experience Oz, said:

“This Autumn, we experienced a 16.1% YoY in operations - aligning with the state's overall growth as reported by Big Red Group. We believe the increased demand is driven by a shift in guests seeking out more experiential, sustainable activities as well as seeking to enjoy South Australia's natural beauty and wildlife. We're perfectly placed to attract travellers who are looking for these types of experiences.”



Swim with Dolphins Catamaran Cruise, SA

SA



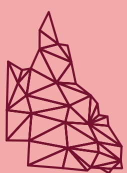
Autumn 2024: -0.08% | Summer: 4.4% | Autumn 2025: 16.8%

South Australia was one of the nation's top performers this Autumn, with the state experiencing a considerable increase in bookings year-on-year to reach an impressive +16.8% uptick.

While Adelaide CBD (-7.5%) and the Murray/ Mallee (-8.2%) region experienced a slight downturn in bookings this season, Limestone Coast and West Torrens had a standout season, with Big Shed Brewing Co assisting the latter in its growth. Additionally, the Kangaroo Island region also experienced a +14.5% uptick.

Despite the wine and dine category trending up this season, the state's premier wine region experienced a mixed Autumn. Adelaide Hills posted 2% growth, while Barossa bookings decreased, down by -16.3% YOY.

QLD



Autumn 2024: -39.7% | Summer: -38.4% | Autumn 2025: -37%

Queensland continued to deal with the fallout of ex-Cyclone Alfred for much of Autumn. As a result, experience bookings across the state remained sluggish, particularly in areas impacted first-hand including Coolangatta (-50.2%) Broadbeach (-27.4%) and Surfer's Paradise (-14%).

However, it wasn't all grey skies - Brisbane's Inner East (+25.8%), and Wynnum - Manly (+15.3%) experienced an uptick. Looking further north, there was substantial growth in Bundaberg (+458%) and Mackay (+200%).

Traditional hotspots Port Douglas (+47.6%) and Cairns (+22.9%) also fared well, with the tropical destinations experiencing a rise in bookings, largely due to a spike in Aussies seeking cruises.

TAS

Autumn 2024: -30.74% | Summer: -33.1% | Autumn 2025: -22.5%

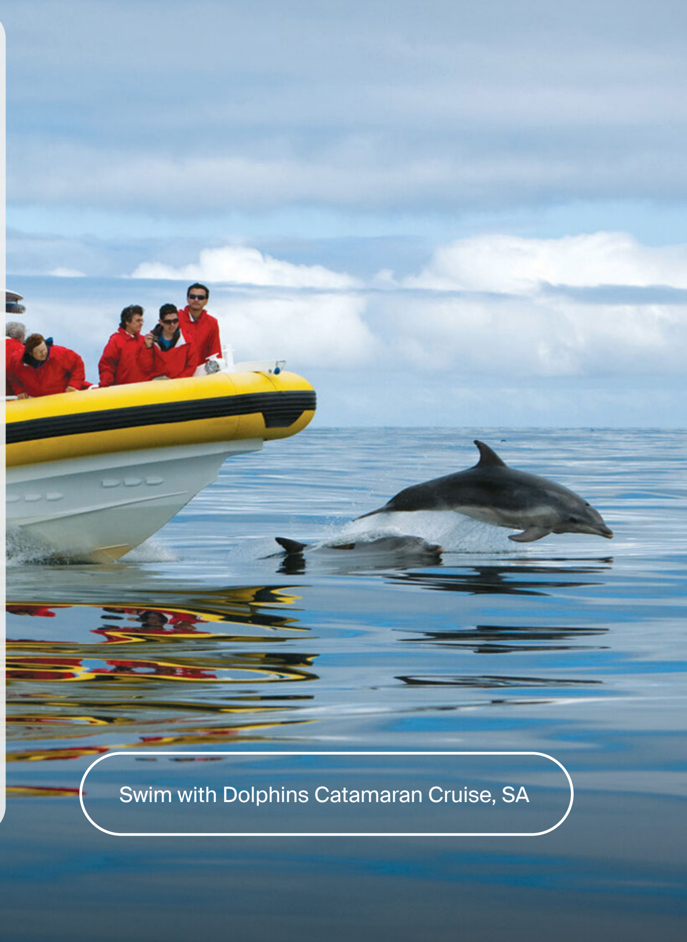
Our most southern state continues to face challenges, with overall bookings declining by just over a fifth (-22.5%). The island state's key destinations of Bruny Island, Central Highlands and Launceston all experienced slight dips by -26.8%, -25.9% and -1.9%, respectively. However, there is cause for optimism, with Devonport (+65.5%) and Hobart's Southern and Western Suburbs (+250%) experiencing notable growth.

The encouraging uptick is a result of increased demand in Animal encounter experiences - with Pennicot Wilderness Journeys in South Hobart helping to lead the charge in the category.

OPERATOR SPOTLIGHT

Melinda Anderson, Marketing manager at Pennicott Wilderness Journeys, which operates the Bruny Island Traveller Cruise in Hobart, through RedBalloon and Experience Oz, said:

> "Autumn brought strong momentum across our southeastern Tasmanian experiences, with Port Arthur and Bruny Island day tours in high demand. We're seeing real appetite among travellers who want new and exciting ways to experience a destination, with international guests leading this desire. They want to get up close and personal with our unique natural landscape when visiting, as this is what we're renowned for, particularly down here in Tasmania."

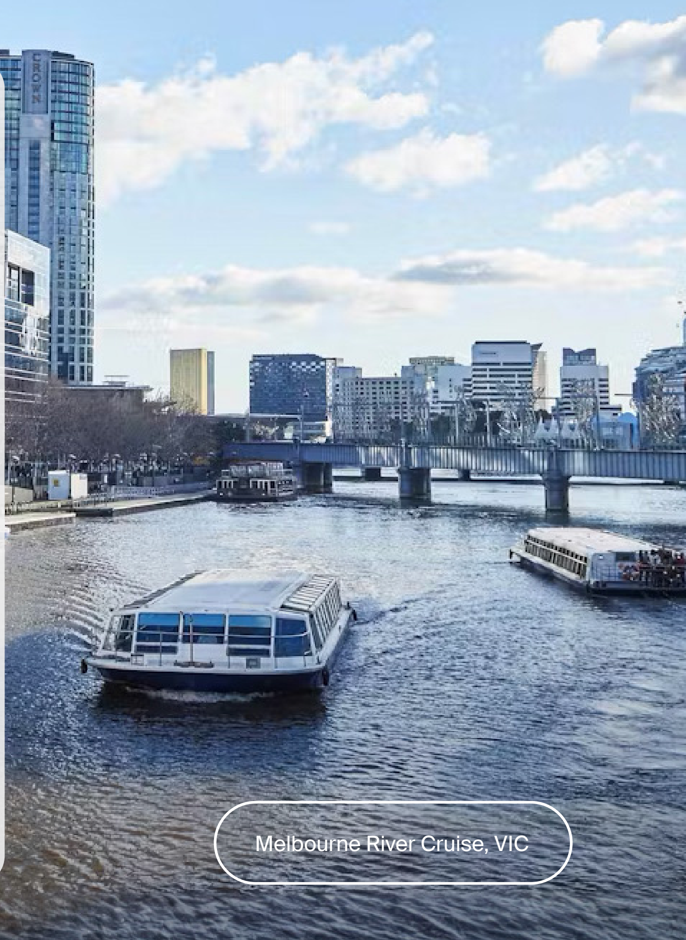


Swim with Dolphins Catamaran Cruise, SA

OPERATOR SPOTLIGHT

Pawan Sawant, Marketing and sales head at Melbourne River Cruises, which operates the Spirit of Melbourne Cruising Restaurant in Melbourne, through RedBalloon and Experience Oz, said:

> "Autumn is one of our strongest seasons, and this year was no exception. With major events like the Formula 1 Grand Prix and Moomba Festival bringing energy and foot traffic to the city - particularly to South Bank where we operate, resulting in a strong demand across all our experiences. The season's mild weather and vibrant atmosphere created ideal cruising conditions, and we increased availability to meet growing interest."



Melbourne River Cruise, VIC

VIC

Autumn 2024: 14.04% | Summer: 0.9% | Autumn 2025: 23%

Unprecedented warm weather in Autumn helped Victoria become the season's standout performer this year. This, coupled with a series of special events like Melbourne Fashion Festival, Formula One Grand Prix, and opening rounds of AFL, had a considerable ripple effect for experience operators across the state.

Surrounding city suburbs of Bayside and Brunswick surged by 230.9% and 81.9% respectively. However, the state's successful season lay further afield with regional destinations including the Bellarine Peninsula (+136.3%), Gippsland (+157.1%) and Warrnambool (+30.5%) emerging as stand-outs.

It was a different story for the Yarra Ranges (-9.1%) and the Mornington Peninsula (0.6%) however, which experienced more subdued seasons overall.

WA

Autumn 2024: -25.24% | Summer: -11.8% | Autumn 2025: -8.1%

The majority of experience bookings in Western Australia continue to be driven by the inner suburbs of Perth, with South Perth surging to the top spot this season - with an impressive +62.6% increase year-on-year. Further gains were delivered by Canning (+52.2%) and Joondalup (+17.4%), which saw significant growth thanks to an increase in the popularity of dining out experiences.

Western Australia's regional hot spots continue to enjoy success with Manjimup, Margaret River/Busselton region and Bunbury up +64.7%, +17.7% and +11.7% respectively. However, it wasn't all good news in the nation's largest state, as fan favourites Fremantle (-40.9%) and Esperance (-60%) dipped despite a continued trend toward short-stay getaways.

**Experience booking data for Autumn 2024 inclusive of 1 Mar - 31 May 2024*
***Experience booking data for Summer inclusive of 1 Dec 2024 - 28 Feb 202*
****Experience booking data for Autumn 2025 inclusive of 1 Mar - 31 May 2025*

Australia's top 20 experience destinations this season

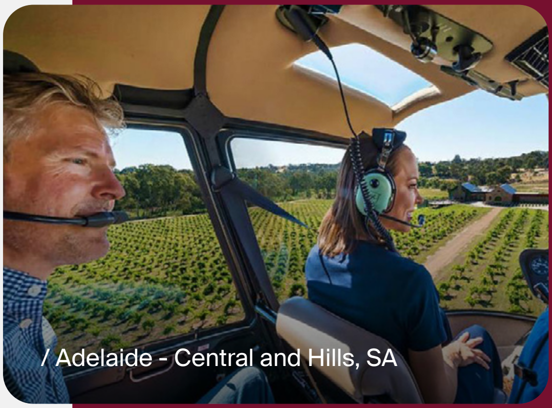
Australia's appetite for unforgettable experiences shows no sign of slowing, with significant returns for destinations across the country.

Whether it's experiences that enable you to sip and savour a region's finest delicacies or get your heart pumping with an adrenaline rush, these 20 standout spots capture the spirit and diversity of Aussie travel through Autumn 2025.

01. Melbourne, VIC
02. Sydney, NSW
03. Ormeau - Oxenford, QLD
04. Cairns, QLD
05. Gold Coast, QLD
06. Mornington Peninsula, VIC
07. Port Douglas, QLD
08. Blue Mountains, NSW
09. Brisbane, QLD
10. Hunter Valley, NSW
11. Melbourne - Outer East, NSW
12. Coolangatta, QLD
13. Adelaide - Central and Hills, SA
14. North Sydney, NSW
15. Perth, WA
16. Sunshine Coast, QLD
17. Geelong, VIC
18. Whitsunday, QLD
19. Western Sydney, NSW
20. Blacktown, NSW


/ Cairns, QLD


/ Mornington Peninsula, VIC


/ Adelaide - Central and Hills, SA


/ Geelong, VIC


/ Blue Mountains, NSW

Emerging tourism & experience trends

As the tourism and experiences industry evolves, new trends emerge to redefine the economy. Drawing from a rich pool of experience data across Big Red Group's expansive network, we've uncovered clear shifts in how both locals and international travellers are exploring Australia - revealing new patterns and preferences set to shape the future of the industry in seasons to come.

Climate resilience

Increasing climate variability is reshaping the way travellers plan and experience a destination. With extreme temperatures and unpredictable weather events becoming more frequent, environmental factors are becoming more central to decision-making, influencing both destinations and the types of experiences sought.

The Zurich-Mandela Climate Risk Index reveals that half of the 178 major tourist sites in Australia are already at high risk of climate-related disasters, which could rise to as much as 80% by 2050.

The impact of the uncertain climate is driving a trend toward bolstering climate resilience efforts, and both operators and travellers are adapting accordingly.

Some consumers are changing their behaviour to avoid disruptions. Big Red Group data showed significant declines in outdoor activities in the wake of a deluge of rain in Queensland and New South Wales in May, but a notable surge in non-weather dependent experiences, indoor golf (+2,600%), escape rooms (+57.1%) and food tasting experiences (+125%).

'Coolcationing' has also emerged as a climate-resilient travel trend that is redefining travel patterns, with travellers seeking out destinations that offer reprieve from surging temperatures.

For tourism operators, climate resilience is no longer a “nice to have” - it’s a necessity. More providers are adopting flexible booking policies, weather-proofing their experiences, and investing in sustainable infrastructure to stay agile and operational, no matter the forecast. However, these efforts need to go even further to include recovery plans to minimise long-term impact on operations in the event of climate-related disruptions.

This presents an opportunity for both travellers and operators to adopt more climate-resilient behaviours to future-proof the travel and experiences economy, with those investing in resilience set not just to reap the benefits in a changed landscape but be best positioned for long-term growth.

Less stuff, more story

Travel today is less about ticking boxes and more about the feeling. With cost-of-living pressures linger, travellers aren’t giving up on big-ticket experiences - they’re simply being more selective. Giving way to increased appetite for more memorable, once-in-a-lifetime experiences that deliver value far beyond the price tag.

Big Red Group data is seeing a striking shift in what’s capturing consumer interest, bookings for helicopter flights are up +92.9%, and adrenaline-inducing ziplining, bungy jumping, and giant swings are up +71.4%. This shows a clear lean toward standout experiences that offer not just escapism, but stories to tell and memories that last beyond the moment.

Driving this demand is a broader shift in consumer mindset. The Australian adventure tourism market is forecasted to expand rapidly, growing from AUD 53.33 billion in 2025 to approximately AUD 174.03 billion by 2032, at a compound annual growth rate of 18.4%, according to Coherent Market Insights.

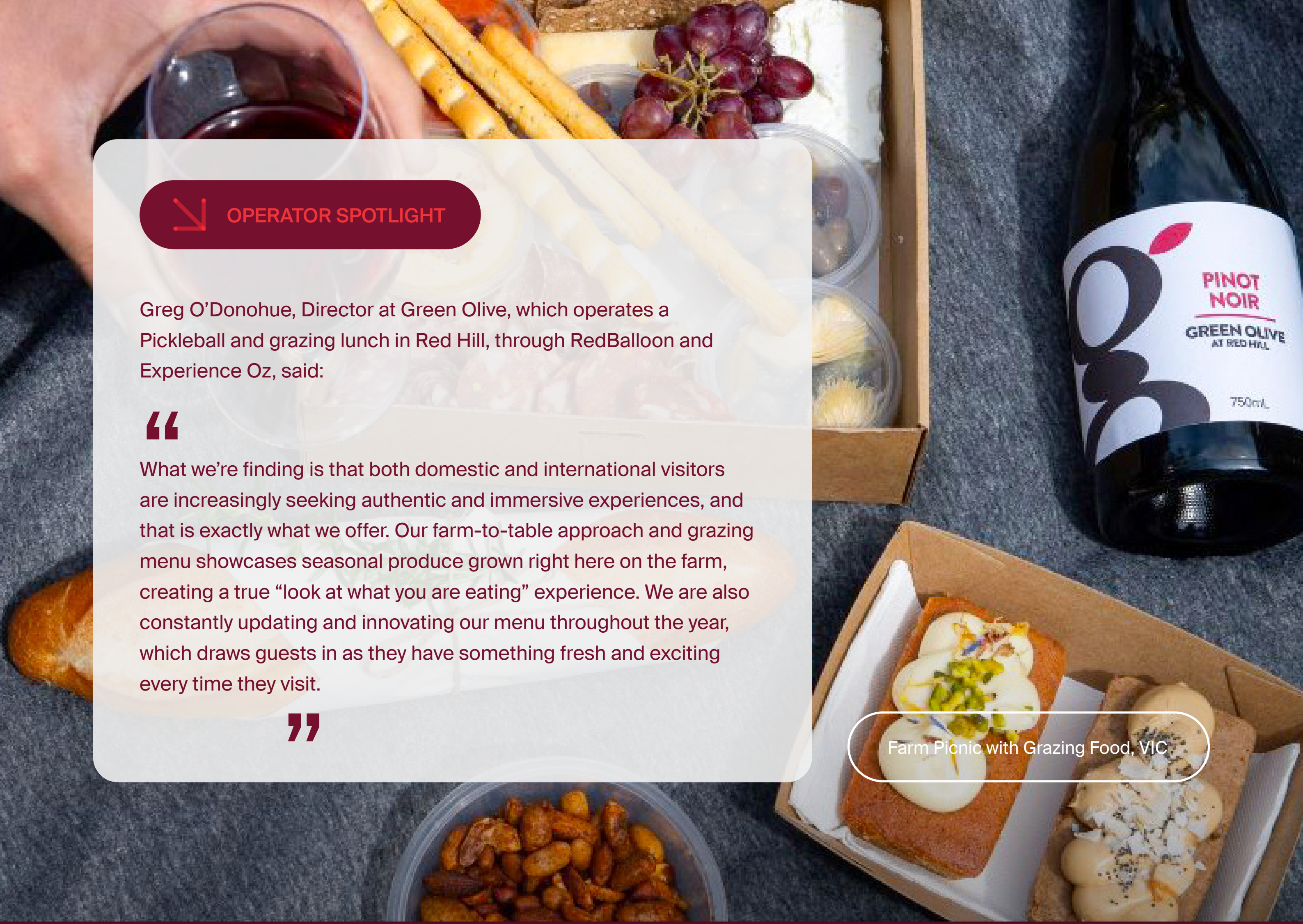
This desire for once-in-a-lifetime experiences is further echoed by findings that showed 22% of Australians plan to engage in more adventurous travel. Travellers want ‘quality over quantity’ - and they’re willing to spend, so long as it feels unforgettable.

OPERATOR SPOTLIGHT

Bridgette Hasting, Chief pilot, administration and trade partnerships at Barossa Helicopter which operates the Barossa Valley Deluxe tour in Lyndoch, through RedBalloon and Adrenaline, said:

> “While demand for our standard scenic flights has remained steady, we’ve seen strong growth in customised, premium experiences. Travellers want more than a one-size-fits-all product, they’re seeking personalisation, exclusivity, and unforgettable moments. Expectations have shifted, guests want to feel their day was designed just for them, and that’s exactly what we deliver. Whether it’s landing at a remote winery or planning a surprise proposal - it is these types of tailored offerings that are driving our growth.”

Scenic Helicopter Flight, SA



Farm Picnic with Grazing Food, VIC

OPERATOR SPOTLIGHT

Greg O'Donohue, Director at Green Olive, which operates a Pickleball and grazing lunch in Red Hill, through RedBalloon and Experience Oz, said:

> "What we're finding is that both domestic and international visitors are increasingly seeking authentic and immersive experiences, and that is exactly what we offer. Our farm-to-table approach and grazing menu showcases seasonal produce grown right here on the farm, creating a true "look at what you are eating" experience. We are also constantly updating and innovating our menu throughout the year, which draws guests in as they have something fresh and exciting every time they visit."

Curated culinary hubs

Following a prolonged period of food and dining being down owing to a subdued economy, Aussies are once again prioritising dining out. Lightspeed's Hospitality Insights & Dining Dynamics '25 report revealed Aussies spend 47% of their monthly dining budget eating out in restaurants and cafes, a trend also reflected in Big Red Group's data.

The 'Eating Out' category grew across all Big Red Group brands this season, up by 6.3%. Similarly, 'Wine & Dine' was also one of the network's fastest-growing categories, with over 27,000 experiences served in Autumn 2025 alone.

With food and drink categories surging, the demand is seeping into the travel industry. Curated dining hubs like Melbourne's Maison Bâtard and Sydney's new Wunderlich Lane development, both in walking distance to boutique accommodation, quickly became hotspots for travellers seeking convenience without compromise.

Further hubs that tap into curated, experiential offerings are already in development across the country, showing the industry is set to further intersect in the coming years. Imarcgroup predicts that Australia's food and beverage tourism market size is expected to reach AUD 165.75 billion by 2033, exhibiting a growth rate (CAGR) of 15.07% during 2025-2033.

For operators, this presents a golden opportunity as aligning themselves with these culinary clusters could mean greater visibility and foot traffic, especially in a market where diners are increasingly willing to travel for standout flavours and share-worthy settings.

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

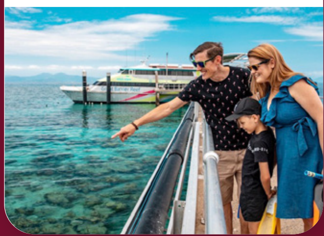
Australia's most recognised adventure experiences brand, connecting the adventurous at heart with the adventures they seek.

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