



Seasonal Experiences Index: Winter 2025

BIG RED GROUP The Experience
Network.

Contents

| | |
|-----------------------|---|
| Foreword from the CEO | 1 |
|-----------------------|---|

| | |
|-------------------------------------------------------|---|
| State of the nation's tourism and experience industry | 2 |
|-------------------------------------------------------|---|

| | |
|-------------------------------------|---|
| Experience hotlist from Winter 2025 | 5 |
|-------------------------------------|---|

| | |
|-------------------------------------------|---|
| A state-by-state overview for Winter 2025 | 7 |
|-------------------------------------------|---|

| | |
|--------------------------------------------------------|----|
| Australia's top 10 experience destinations this season | 13 |
|--------------------------------------------------------|----|

| | |
|----------------------------------------|----|
| Emerging tourism and experience trends | 14 |
|----------------------------------------|----|

| | |
|---------------------|----|
| About Big Red Group | 16 |
|---------------------|----|



Foreword

I'm delighted to share Big Red Group's latest Seasonal Experiences Index report, which captures the insights and shifts seen in the travel and experiences industry this Winter 2025.

Drawing on insights from close to 200,000 experiences served this season, the report highlights the continued strength of the sector, even during the nation's colder months. Travellers are entering their "Enrichment Era", as wellness tourism evolves to focus on nourishing the mind and soul through meaningful, immersive activities. This season, there's also been a shift in consumers seeking experiences that align with their passions, resulting in a shift in how Australians and international visitors alike are experiencing all that Australia has to offer.

While economic headwinds persist, the industry continues to show resilience. Our experience operators have adapted to meet consumer demands with creativity and long-term sustenance.

We hope this Winter 2025 snapshot offers meaningful insight into the current state of Australia's tourism industry and provides a clear view of where it's headed, ahead of a rapidly approaching Spring season.

While challenges remain, we - alongside our substantial network of experience operators - are optimistic that further growth and positive momentum lie ahead.

David Anderson

CEO & Co-Founder, Big Red Group

State of the nation's tourism and experience industry



While typically thought of as a 'quiet period' for the tourism industry, Winter 2025 showed considerable momentum, with wellness (+34.1%), getaways (+15.1%), and classes and courses (+11.2%) propelling the industry into an era of change and evolution.



How are visitor numbers looking?

Fresh insights from the [Australian Bureau of Statistics \(ABS\)](#) show inbound tourism is continuing its upward trajectory, up 6.3% year-on-year. The market segment has continued to grow in leaps and bounds three years on from international borders reopening, with Big Red Group data showing inbound experience bookings are up by +47% year-on-year for Winter 2025, on top of the 89% growth seen in 2024.

The influx of international travellers has had significant ripple effects for operators across the country, as they sought to experience offerings synonymous with Australia, like theme parks, zoos or whale and dolphin watching, as well as ecological & agricultural attractions. Beyond experiences, this surge in travellers has also led the transportation and services category to considerable growth, with bookings for companies like SkyBus growing by +61.8% year-on-year.

The boom follows years of upheaval and demonstrates that the industry is firmly on track to surpass pre-pandemic levels by year's end, with the segment's rapid momentum and resilience emerging as a driving force behind inbound tourism's recovery.

Closer to home, demand for domestic tourism remained strong in Winter, with demand for getaways increasing by +15% as Aussies were attracted to the predictability of staying local. It came as travellers to the US and Europe faced disruption this season - exacerbated by political tensions and volatile markets.

Furthermore, in an encouraging sign, the domestic market is projected to contribute \$314.4 billion to the national economy, according to new data from the World Travel & Tourism Council's (WTTC) latest [Economic Impact Research](#).



Private Luxury Stay - CABN X, SA



+15%

Getaways



\$314.4B

Domestic market is projected to contribute to the national economy



How is visitor spending looking?

Insights from the same WTTC research report allude to healthy total tourism consumption within Australia, as international visitor spend continues to trend upward, anticipated to reach \$39 billion this year - a 22% increase on last year.

Interestingly, domestic visitor spend is also anticipated to deliver considerable returns, with consumption for interstate/intrastate forecast to climb to \$173 billion.

While household budgets remain tight, small reprieves in cost-of-living pressures and recent RBA interest cuts have generated an air of confidence for discretionary spending. Westpac's latest [Household Spending Indicator Bulletin](#) showed household expenditure climbed by +4.8% in comparison to the same period last year, with spending for recreation and culture rising by +7.9%.

Big Red Group data was reminiscent of this trend, demonstrating that while the number of experiences booked this season was level, average order value (AOV) was relatively flat. However, in an encouraging sign, the experience gifting brand, [RedBalloon](#), posted 4.9% growth this season. This indicates that while consumers are spending, they are continuing to monitor their purse strings and remain mindful of their purchases.



What does this mean for the experience industry?

The current state of the industry shows an incredibly positive outlook for an industry that was effectively brought to its knees five years ago. With inbound tourism accelerating, domestic tourism proving resilient, and RBA cuts promoting an air of cautious optimism, the nation's tourism and experiences sector appears to be on the precipice of a period of strength.

Yet, this momentum brings equally significant challenges that demand strategic investment. The rise in both international and domestic travellers risks causing infrastructure strains, as well as amplifying overtourism concerns if numbers remain concentrated to the country's east coast. Without addressing Australia's long-standing challenge of regional dispersal, growth could quickly become unsustainable.

By proactively tackling these pressures as an industry, there's a unique opportunity to transform today's momentum into a sustainable future so that our tourism and experience operators can continue to thrive.



INDUSTRY INSIGHT

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

“

Winter 2025 has shown that Australian tourism is rebalancing after years of uncertainty. This is underscored by surging inbound visitation, resilient domestic demand, and the growth of wellness and experience-led travel, which signal a shift toward more intentional, value-driven journeys.

Yet, with restabilisation comes a responsibility and need to continue to invest in infrastructure, diversify regional offerings, and tailor experiences to evolving consumer demand so that the industry can sustain its long-awaited momentum.

”



Experience hotlist from Winter 2025



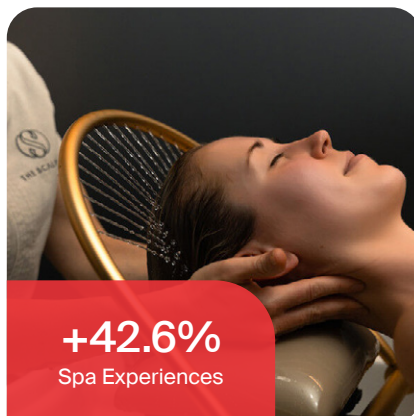
In spite of the harsher weather, Winter continues to offer a season of standout experiences, granting the opportunity to attract travellers through memorable activities that are often available at a more accessible price point than peak season counterparts.

Research from the **Tourism & Transport Forum (TTF)** found that 68% of Aussies planned to go on a holiday between 15 June and 15 August this year, with two distinctive narratives playing out across the winter months: chase the sun or go on a snowcation - owing to Australia's vast geography and varied climate.

While last year's snow season proved disappointing for operators and travellers alike - thanks to unusually warm and dry weather (source: **CSIRO**) - skiing experiences have delivered strong returns for 2025, with bookings more than doubling year-on-year (+109.8%). Meanwhile, other fast-growing categories included luxury getaways (+70.6%), spa (+42.6%), and V8's (+25.2%), signalling a sustained interest in both indulgent escapes and adrenaline-fuelled activities.



+70.6%
Luxury Getaways



+42.6%
Spa Experiences



+25.2%
V8 Experiences

The season brought with it a striking mix of weather conditions across Australia, with Sydney experiencing its wettest August in nearly three decades, according to [Weatherzone](#). The typically sunny city experienced intense rain, with 194mm falling in just 11 days, triggering widespread flooding across New South Wales and affecting major events like City2Surf.

Queensland's coastal regions also faced intense winter storms, including rare hailstorms as far north as K'gari (Fraser Island), causing damage and hazardous conditions. In contrast, the southern alpine regions enjoyed steady snowfall, providing an ideal setting for winter sports and outdoor experiences.

Despite the challenging conditions, outdoor experiences like theme parks, whale watching, and zoos continued to dominate bookings in Winter 2025.

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



+10.3% YoY
Theme Parks



01. Theme Parks
02. Whale Watching & Dolphin Watching
03. Zoos
04. Reef & Island Cruises
05. Eating Out
06. Special Event & Celebration Cruises
07. Hot Air Ballooning
08. Sightseeing & Cultural Tours
09. Skyrail, Cable-Cars & Scenic Railway
10. Aquarium

Despite some weather setbacks, theme parks maintained their lead this season, with a +10.3% booking increase, reaffirming their appeal among families and international travellers alike. This season saw whale watching, cultural tours, and scenic railways rise into the hotlist as traveller preferences shifted toward immersive, nature-driven experiences that offer authentic connection.



OPERATOR SPOTLIGHT

Mark Olsen, Chief Executive Officer, Tourism Tropical North Queensland:



It has been a late start to the winter season for Tropical North Queensland, with the July school holidays marking the start of increased domestic visitor arrivals. From there, we saw numbers pick up strongly in line with school holiday dates coinciding in three states and continue throughout August as southerners escaped the cold for the tropics.



Rainforest, Aboriginal Culture and Wildlife Tour, QLD

A state- by-state overview for Winter 2025



| | Experiences Booked Winter 2024* for reference | Experiences Booked Autumn 2025** for reference | Experiences Booked Winter 2025*** |
|-----|-----------------------------------------------------|------------------------------------------------------|--------------------------------------|
| ACT | -6.5% | +20.6% | +23.9% |
| NSW | -26.5% | -5.3% | +1.6% |
| NT | -30.2% | -5.1% | -11.8% |
| QLD | -8.6% | -37% | -14.2% |
| SA | -34.1% | +16.8% | +3.4% |
| TAS | -4.4% | -22.5% | -21.6% |
| VIC | +10.9% | +23% | +14.9% |
| WA | -16.5% | -8.1% | -5.3% |



Big Red Group's booking analysis

Digging into the data further, we see mixed results emerge as the upticks delivered by certain states were counterbalanced by downturns in other destinations. As Australia tends to experience a range of climates across the country during this season as well as continue to grapple with issues around tourism dispersal, the variation isn't surprising.

- The Australian Capital Territory (ACT), Victoria and South Australia all continued their upward streak - with the capital the country's standout performer - surging by +23%.
- Victoria (+14.6%) remains one to watch as it posts continued growth, further cementing itself as Australia's third tourism state as it continues to close the margin in booking numbers between rival, New South Wales.
- After experiencing a stagnant growth period over successive seasons, New South Wales saw modest growth, up +1.6% despite the state experiencing an unusually wet winter.

Numbers in the Northern Territory (NT), Tasmania and Western Australia remained subdued as bookings were concentrated to the country's east, demonstrating that there remains a job to be done to ensure greater dispersal of travel.



Kangaroo Island Guided Buggy Tour, SA

→ State-based highs and lows for Winter

ACT



Winter 2024: -6.5% | Autumn 2025: +20.6% | Winter 2025: +23.9%

The ACT has continued its upward growth to emerge as the season's standout destination this Winter, with North Canberra (+28.7%) and Weston Creek (+13.6%) helping the nation's capital to +23.9% year-on-year growth, thanks to a surge in eating out, high tea, and axe throwing experiences. It comes despite waning booking numbers in Gungahlin and Molongo which slipped by -14.3% and -12% respectively.

Alpaca Adventure, ACT

NSW



Winter 2024: -26.5% | Autumn 2025: -5.3% | Winter 2025: +1.6%

After trending down for consecutive seasons, NSW - Australia's second highest tourism state - has gained traction to post 1.6% growth in Winter. The gain comes despite the state experiencing a barrage of extreme weather, including an unprecedented bomb cyclone which made landfall in July.

This season, there was a noticeable shift toward regional with increases seen in Lake Macquarie (+124%) and the Southern Highlands (+36.7%), while overall Sydney inner city experiences (-67%) slipped - demand for attractions, eating out, and aquarium and zoos remained strong.

Coastal regions of Port Stephens (-66.8%), Wollongong (-49.6%) and Shoalhaven (-31%) experienced a weaker Winter. This was despite the destinations being situated along the 'humpback highway' and whale and dolphin watching rising into the season's experience hotlist.

NT



Winter 2024: -30.2% | Autumn 2025: -5.1% | Winter 2025: -11.8%

Booking numbers for the NT continue to fluctuate, back by -11.8% year-on-year this season. The slide is possibly owing to Aussies looking to chase the sun in warmer, more accessible locations, with the latter - alongside higher costs - long acting as persistent barriers for travellers to the region.

While key hotspots like Katherine (-88.1%) and Alice Springs (-73.4%) dipped further on Winter 2024 bookings, Darwin emerged as a bright spot. The top-end destination delivered the territory's most significant growth of +10.4% with the help of Darwin Harbour Cruises.



OPERATOR SPOTLIGHT

Nikki Giumelli, Communications and Industry Relations Manager at Cairns Adventure Group, which operates Half Day River Tubing Tours from Cairns through ExperienceOz, said:

“

Winter was a strong season for us. We saw solid bookings across our adventure experiences with Cairns River Tubing, especially popular among domestic travellers. These returns can be attributed to

our mild dry-season climate, well-targeted interstate marketing, and a growing appetite for nature-based experiences that are accessible to a range of ages and ability levels. This has generated an air of optimism ahead of Spring, particularly with the new season promising warmer weather, a greater uptick in international arrivals, and the continued strength from the cruise market.

”



QLD



Winter 2024: -8.6% | Autumn 2025: -37% | Winter 2025: -14.2%

Queensland is another destination that continues to waver, after a downturn in Autumn, the sunshine state has minimised losses, pulling back to -14.2% demonstrating that after a long period of disruption from extreme weather, Australia's biggest tourism state appears to be on the road to recovery.

The Hills district and Brisbane's inner eastern and northern suburbs delivered some of the biggest gains, up +188%, +73.1%, and +18.3% respectively. However, it appeared to be a tale of two states - with booking numbers for northern destinations like the Whitsundays (-91.6%), Maroochydore (-81%) and Hervey Bay (-41.2%) undergoing declines.

SA



Winter 2024: -34.1% | Autumn 2025: +16.8% | Winter 2025: +3.4%

South Australia continues to enjoy an uptick in tourism and experience bookings, continuing its momentum to increase by +3.4%. Shrinkages in central locations like Adelaide City (-2.8%) and West Adelaide (-1.8%) were offset by significant gains in more outer city and regional destinations.

The Adelaide Hills had a standout season - assisted by Grunthal - to build on its growth in Autumn, surging by +45.2%, while the Murray/Mallee region recovered to experience a +35.6% upswing. Whereas the tourism share for traditional hotspots - including Kangaroo Island (-51.1%) and the Barossa (-25.8%) decreased year-on-year.

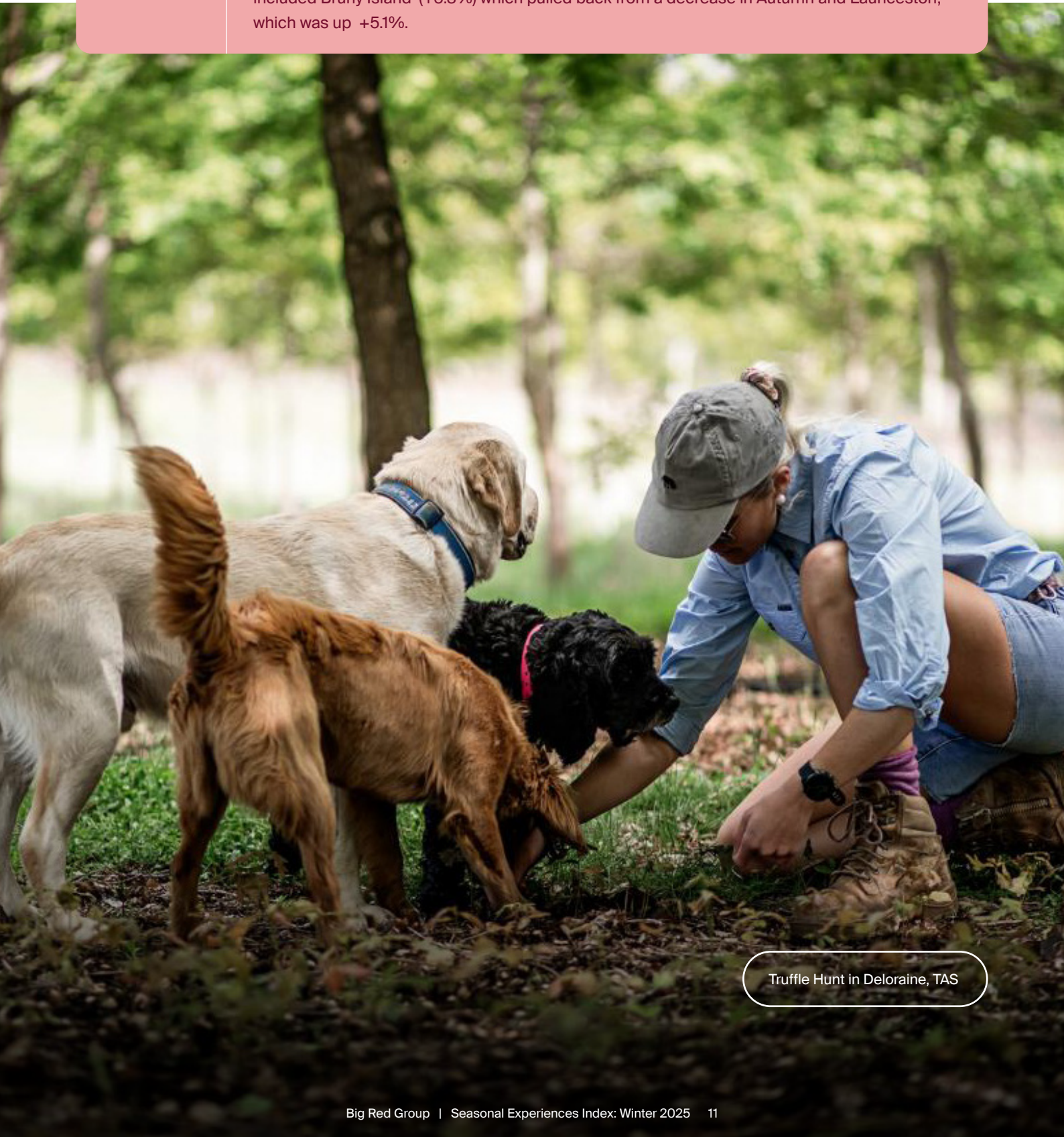
TAS



Winter 2024: -4.4% | Autumn 2025: -22.5% | Winter 2025: -21.6%

As one of Australia's colder destinations, the island state encountered challenges this season as holidaymakers looked north in search of warmer weather. This resulted in an overall decline of -21.6% as experience bookings trended down in Brighton (-72.2%), the South East Coast (-31.5%) and Devonport (-16.7%).

However, the state was not without its silver linings with pockets of growth emerging in key destinations. The North East region was the state's top performer this season, with bookings surging by +47.4% - thanks in part to an upswing in demand for truffle hunting. Other hotspots included Bruny Island (+5.3%) which pulled back from a decrease in Autumn and Launceston, which was up +5.1%.



Truffle Hunt in Deloraine, TAS



OPERATOR SPOTLIGHT

Melissa Squilliacce, Functions and Events Coordinator at Lot20, which operates Lot Twenty Cocktail Making Class through RedBalloon said:

“

Winter in Perth can sometimes be a challenging time for hospitality venues in the city, so during this season, we like to focus on new experiences and events that draw people out of their houses and into our venue. Now, with the days getting warmer, we're already beginning to see bookings begin to pick up as more guests arrive through our doors, leaving us feeling excited for what's in store for the remainder of 2025.

”

Cocktail Making Class, WA

VIC



Winter 2024: +10.9% | Autumn 2025: +23% | Winter 2025: +14.9%

Victoria continues to move from strength to strength. Experience bookings in the state grew for the third consecutive season as it rapidly gained ground on northern neighbour, New South Wales - to close the gap between to just under 5,000 experience bookings.

The Mornington Peninsula reemerged as a major tourism driver this season, with activity bookings surging by a third (+33%). This growth is linked to the Peninsula's reputation as a top destination for spa and wellness experiences - which grew by +42.6% and +34.1% respectively. Other key growth areas include the inner city suburb of Stonnington (+27.6%) and the Yarra region (+23.2%).

WA



Winter 2024: -16.5% | Autumn 2025: -8.5% | Winter 2025: -5.3%

While it's heading toward stabilisation, Western Australia continues to experience subdued seasons, likely due to accessibility challenges and competition from states with stronger seasonal positioning. This potentially resulted in downturns in typical hotspots like Bunbury (-69.5%), Albany (-44.4%) and Margaret River (-28.5%) - despite a swing toward getaways this season (+15.1%).

Activity numbers for inner city suburbs remained relatively flat, with Inner Perth and Perth City bookings hovering around +2.6% and -2.7% respectively - this comes despite the regions typically being hotspots for experience bookings.

*Experience booking data for Winter 2024 inclusive of 1 Jun - 31 Aug 2024

**Experience booking data for Autumn inclusive of 1 Mar - 31 May 2025

***Experience booking data for Winter 2025 inclusive of 1 Jun - 10 Aug 2025

Australia's top 10 experience destinations this season

Australians embraced a mix of cultural capitals and seasonal escapes this Winter, as they didn't let the season's brisk climate deter them from experiencing all that the country has to offer resulting in significant returns for destinations across the country.

Whether it's vibrant cities with easy access to nature or laid-back hubs that are perfect for recharging, these 10 standout locations capture the spirit and diversity of Aussie travel through Winter 2025.

- 01.** Melbourne, VIC
- 02.** Ormeau - Oxenford, QLD *^ up from 3rd*
- 03.** Surfers Paradise, QLD *^ up from 5th*
- 04.** Cairns, QLD
- 05.** Sydney, NSW
- 06.** Mosman, NSW
- 07.** Port Douglas, QLD
- 08.** Blue Mountains, NSW *^ up from 19th*
- 09.** Mornington Peninsula, VIC
- 10.** Brisbane, QLD



/ Melbourne, VIC



/ Gold Coast, QLD



/ Hunter Valley, NSW

Emerging tourism & experience trends



The tourism and experiences sector is undergoing significant structural change, driven by shifts in the market and consumer behaviour that are reshaping the industry.

Leveraging insights from Big Red Group's comprehensive platform data, we can identify how Aussies and international visitors alike are choosing to experience the country differently and uncover emerging trends that are set to inform the direction of the industry for the remainder of 2025 and beyond.



Mind, body, and beyond

Demand for wellness tourism continues to prosper, with the market in Australia expected to generate AUD 45.7 million in revenue by 2030, according to Horizon Grand View Research. However, the tourism sub-sector is evolving beyond traditional relaxation and self-care to encompass deeper, more enriching experiences, with Hilton's 2025 Trends Report revealing more than one in five travellers planned to get away for self-discovery this year.

Enter the 'era of enrichment'. Building on the foundation of wellness tourism, this new era sees focus move beyond traditional wellness to experiences that offer enrichment of the mind, and soul through meaningful, immersive activities.

Big Red Group data aligns with this transformation - with data showing a particular upturn in wellness and classes and courses, which jumped by +34.1% and +11.2% respectively. This demonstrates Aussies are progressively seeking out experiences that promote personal growth and self-improvement. Ultimately, this is leading to the wellness category being redefined as a path to empowerment and enrichment versus relaxation.

For tourism and experience operators, it's an exciting opportunity to reposition their offerings as vehicles for self-discovery helping to equip travellers with tools, knowledge, and practices that endure long after the experience is over. In doing so, they can tap into a fast-emerging market segment where enrichment and self-improvement are the ultimate souvenir.



Passion pursuits

With 'revenge travel' now a trend of the past, consumer behaviour is giving way to a more intentional approach to travel. In recent years, travel and experiences have been centred around urgency following years of disruption. Yet, in 2025, Aussies are taking a slower approach, by demonstrating greater intentionality when it comes to where and how they choose to experience a destination.

Big Red Group data shows a slip in traditional tourism and experience categories. Cruises (-27.4%), tours (-25.1%) and attractions (-3.4%) trended down while hyper-personal and niche experiences, like indoor golf (+115.1%), stargazing (+48.8%) and rally driving (+11.5%) rose. This shows Aussies were looking further afield for activities that resonate with their personal passions.

This shift is also reflected in insights from [Skyscanner's 2025 Travel Trends](#) report, which leaned heavily into a shift toward community and passion-led travel, with travellers increasingly opting for experiences tied to their interests.

What do these passionate pursuits mean for the industry? It's becoming clearer that there is no longer a 'one size fits all' approach to tourism offerings as consumers go beyond traditional experiences as they increasingly embrace more tailored activities that resonate with their individual values.



OPERATOR SPOTLIGHT

Graham Elliott, Chief Executive Officer of Fastrack Experiences, who operates Exotic Supercar Experiences through RedBalloon and Adrenaline, said:



This winter, we experienced a +22% year-on-year increase in bookings, with growth across both our V8 Racecar drives and new Exotic Supercars experiences. We're continuing to see strong demand from guests seeking high-adrenaline, bucket-list activities at iconic locations like Sandown Raceway. Looking ahead, we're well-positioned to carry this momentum into Spring with forward bookings for our premier V8 Racecar Bathurst event looking incredibly strong.



Toro Lamborghini Supercar, NSW



BIG RED GROUP

The Experience Network

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.



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