



Spending by Australian travellers recovered by 2023, visitation levels are expected to recover by 2025.

Market Forecast Insights

Spending and visitation from Australia is recovering at a quicker pace than other Asia-Pacific markets. The recovery of visits from Australia is lagging most European and North American markets, however spending by Australians is recovering briskly. Visits from Australia reached 72% of 2019 levels by the end of 2023 and spending is expected to reach 101% of 2019 levels. Long-term, Australia is projected to be one of the fastest growing markets for Canada.

- Overnight visits from Australia will recover in 2025, reaching 124% of 2019 levels.
- Spending by Australians could surpass 2019 levels in 2023, reaching 101% of 2019 levels.
- In 2025, 435,000 travellers from Australia are expected to visit Canada and spend \$1.3 billion.

Market Forecast Highlights¹

Spending and visitation levels (% relative to 2019)

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	16	4	48	101	134	165	169	180	190	195	201
Visitation	100	14	3	45	72	98	124	138	143	147	151	154

● 0%-50%
 ● 51%-75%
 ● 76%-100%
 ● 101%-120%
 ● 121%+

Forecast Context and Assumptions¹

Travel Sentiment

- Australians will continue to travel overseas with 75% planning to travel the same amount or more than in 2023.²
- Thirty-nine percent of Australians plan an international holiday in the next 12 months.³

International Travel Conditions

- Australians report that the greatest barriers to travel are the price of travel (52%) and the price of accommodation (38%).³

Economy⁴

- A tight labour market and rising wages will support moderate consumer spending growth.
- GDP growth of 2.0% is expected in 2023, which is expected to increase in 2024 to 1.2%.
- The Canadian dollar is expected to slowly weaken relative to the Australian dollar over the forecast horizon, increasing the purchasing power of the Australian traveller.

The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.

¹ DC Tourism Outlook Forecast, Fall 2023
² Skyscanner, Travel Trends 2024, November 2023
³ YouGov Global Travel Profiles | December 2023
⁴ Oxford Economics



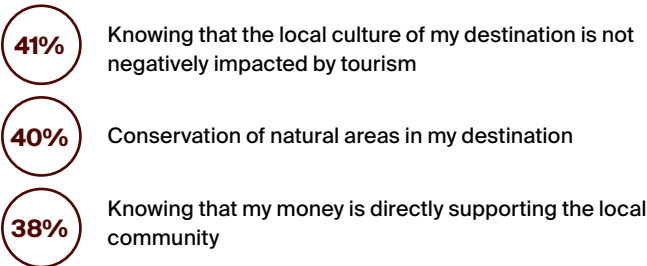
Total Long-Haul Travellers

Australians aged 18 and older who have taken a long-haul pleasure trip outside of Australia, New Zealand, and the Pacific Islands in the past three years, or plan to take a such a trip in the next two years.

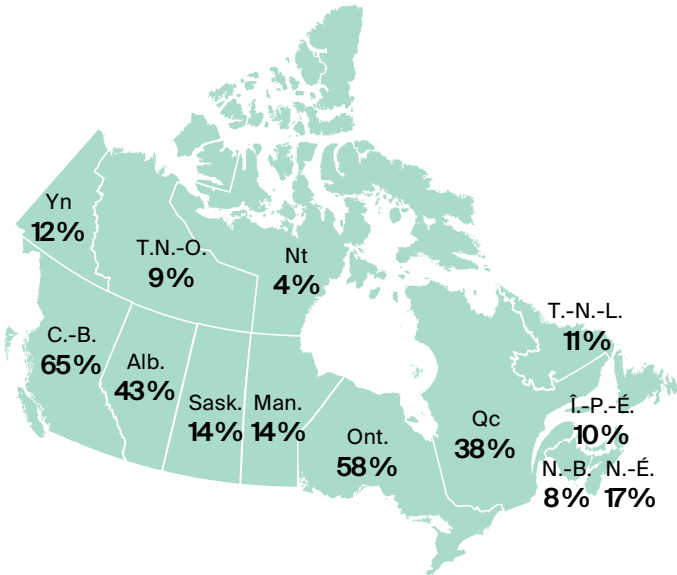
Potential Market Size⁵



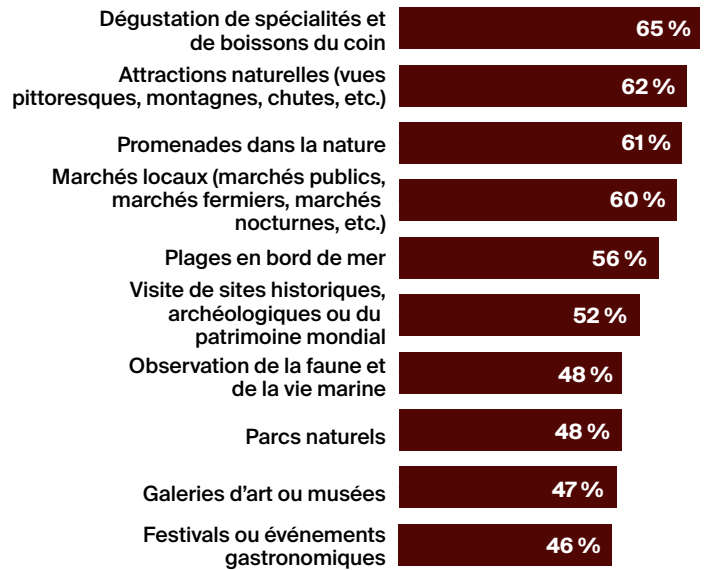
Top 3 Most Important Sustainability Efforts⁵



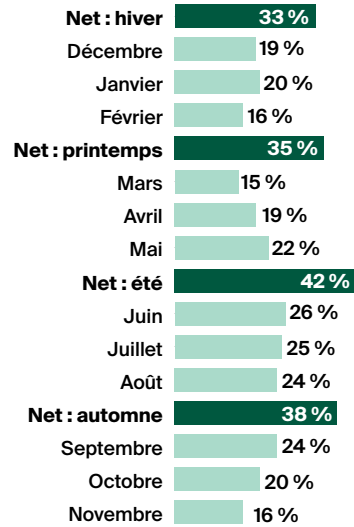
Likelihood to Visit Canadian Regions (Next 2 Years)⁵



Top Activities of Interest While on Vacation⁵



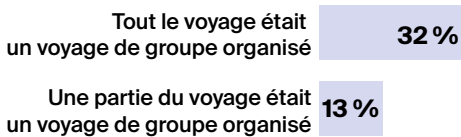
Canada Consideration By Seasons⁵



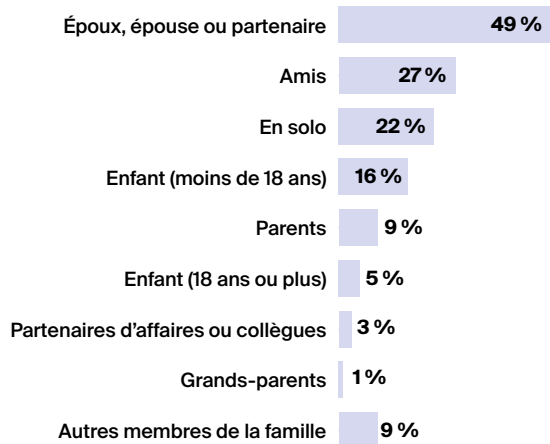
Travel Agent Usage for Most Recent Trip⁵



Organized Tour Usage for Recent Trip⁵



Travel Party of Recent Trip⁵



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⁵ Global Traveller Research Program 2023.