



A key market for Canada, Australia plays a critical role in supporting both seasonal demand and geographic dispersion.

Australia led Canada’s early recovery, with spending reaching \$820 million in 2023 – exceeding 2019 levels. However, visitation growth slowed in 2024 and is now on a longer recovery trajectory. Current trends suggest a full return to 2019 visitor volumes by 2029.

- The Australian dollar, after strengthening in 2022–23, is expected to weaken, affecting travel affordability. Economic growth is projected to rebound in 2026 after a slower 2025.
- Spending will reach 136% of 2019 levels by 2026.
- Visits will grow 9.6% from 2025 to 2026 but remain below pre-pandemic levels.
- In 2026, Canada is forecasted to welcome 307,700 Australian visitors, who will spend \$1.1 billion.

Spending and visitation levels (% relative to 2019)<sup>1</sup>

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Spend	100	16	4	48	104	107	121	136	149	158	166	276
Visitation	100	14	3	45	72	74	80	88	95	98	101	105

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

There is an unprecedented economic opportunity from a growing tourism industry, but there is significant potential for disruption in 2025. To remain resilient, our industry must reinforce that Canada remains open and friendly.

Potential Market Size<sup>2</sup>

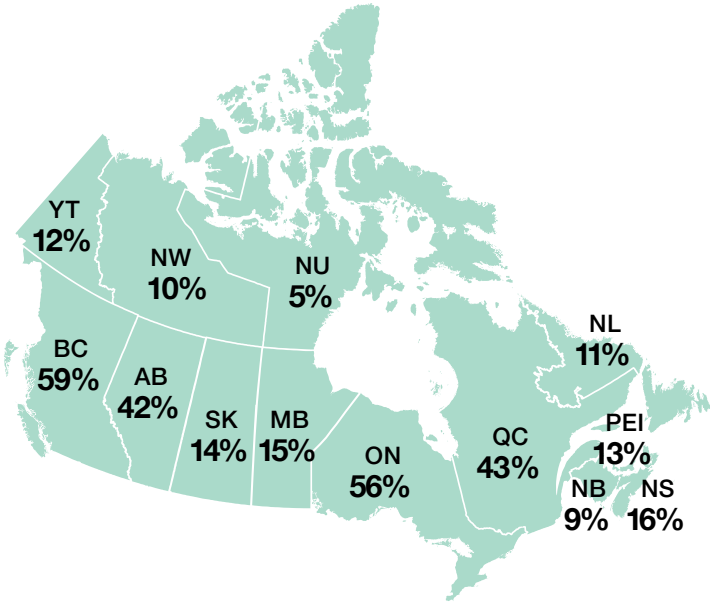


Total potential for long-haul travellers

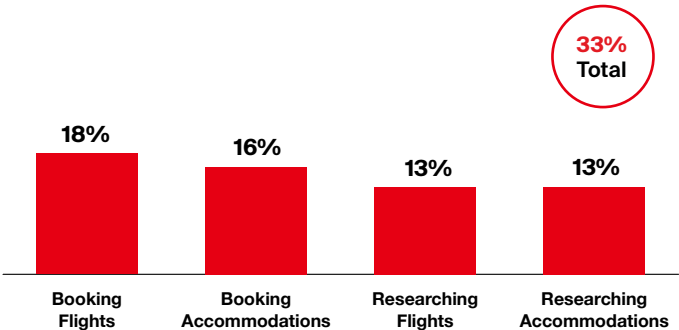


Canada's immediate potential

Likelihood to Visit Canadian Regions (Next 2 Years)

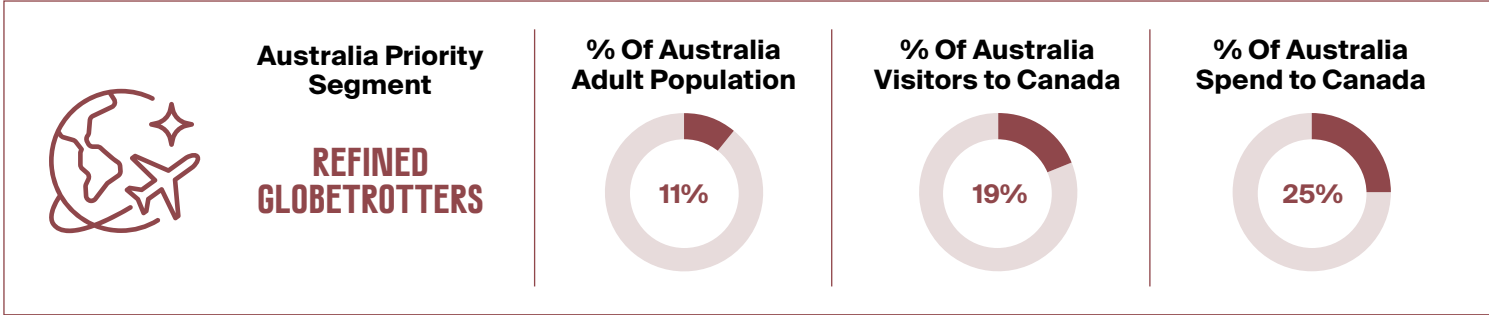


Use Travel Agent on Canada Trip<sup>2</sup>



The DC Tourism Outlook Fall 2023 has been adjusted from 2023 to 2025 to reflect the latest arrival numbers.  
<sup>1</sup> Destination Canada Tourism Outlook 2025-2030  
<sup>2</sup> Destination Canada Global Traveller Research Program 2024

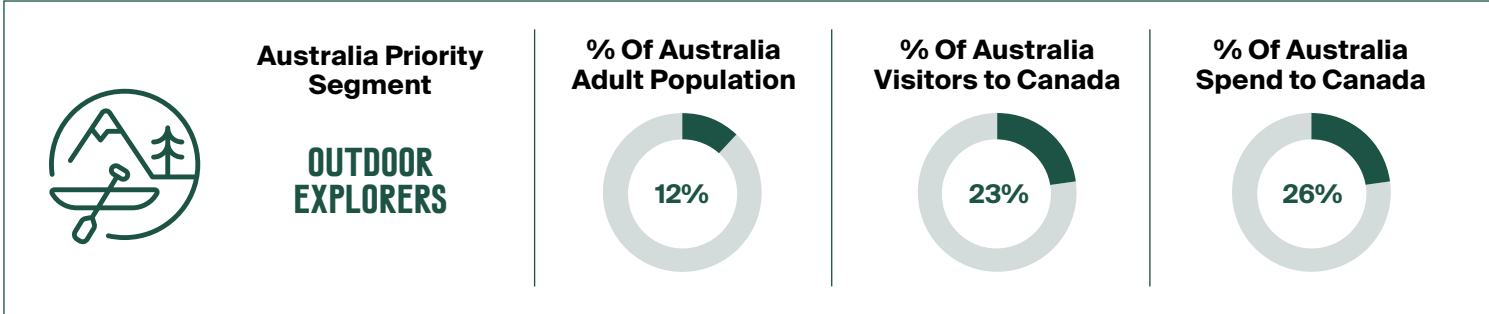
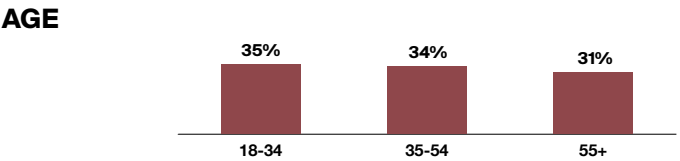
In Australia, there are two key priority segments selected through advanced analysis of their alignment to Canada’s product offerings, their potential economic impact, brand alignment, and their ability to benefit Canadian communities.



We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

- TOP CANADA ACTIVITIES
- Local Cuisine
  - Cultural Experiences & Attractions
  - Health and Wellness
  - Guided Tours
  - Nature Experiences

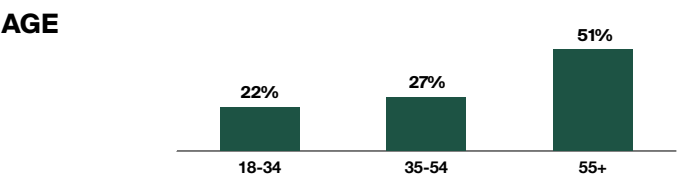
Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★★ (Very High)
Travel Trade for non-group travel	★★★★★ (Very High)



We are nature explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

- TOP CANADA ACTIVITIES
- Nature Experiences
  - High-intensity Sports
  - Water / Winter Based Sports
  - Casual Sports

Type of Travel Trade	Level of Use (compared to rest of market)
Travel Trade for group travel	★★★★☆ (High)
Travel Trade for non-group travel	★★★★☆ (Average)



Source: Destination Canada Traveller Segmentation Program 2024

Note: Segment sizing estimates will differ from those in the Global Traveller Research Program (GTRP), which applies stricter screening criteria—specifically a more narrowly defined long-haul traveller profile.

For further information, please contact:

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