VISITOR ECONOMY SYMPOSIUM DOMESTIC EXPERIENCES

Data and Your Decision-Making

fiftyfive5
Part of **Accenture** Song


AI will replace 80% of jobs by 2026
TechCrunch · just now
10 AI tools you NEED right now
Newsletter · 2 min ago
Are you using AI enough?
Forbes · 4 min ago
GPT-8 launches — changes everything
Wired · 6 min ago
The AI revolution you can't ignore
HBR · 8 min ago
Slides: AI & the Future of Work
LinkedIn · 12 min ago
AI reshaping the travel industry
Bloomberg · 15 min ago
Why every exec needs an AI strategy
McKinsey · 18 min ago
Webinar: Prompt engineering 301
Eventbrite · 22 min ago
AI model update: v12.5.0 released
GitHub · 25 min ago
10x your output with AI agents
Autonomous AI: what comes next
AI overload
real places.
real guides.
real moments.
human-led travel

DESTINATION NSW CONDUCTED PRIMARY RESEARCH TO:

Define the level of interest and motivation for different travel experiences

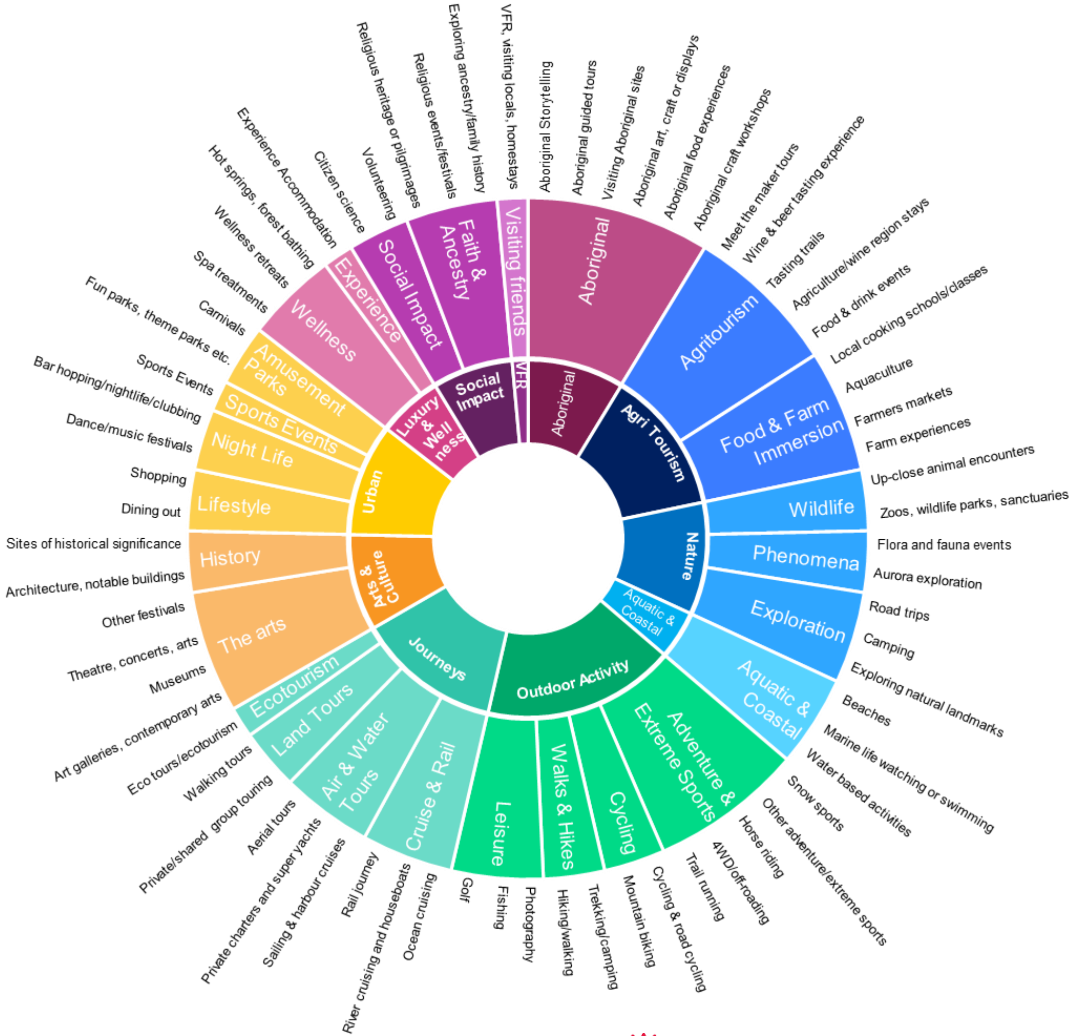
Understand what experiences NSW is well-known for

Identify experience opportunities where we can strengthen travel intention amongst domestic travellers

69

Primary experiences

WE CREATED MEANINGFUL EXPERIENCE CLUSTERS TO AID DECISION MAKING & PLANNING



BASED ON STATED TRAVEL NEEDS WE WERE ABLE TO IDENTIFY 6 DISTINCT DOMESTIC TRAVELLER TYPES

Connection

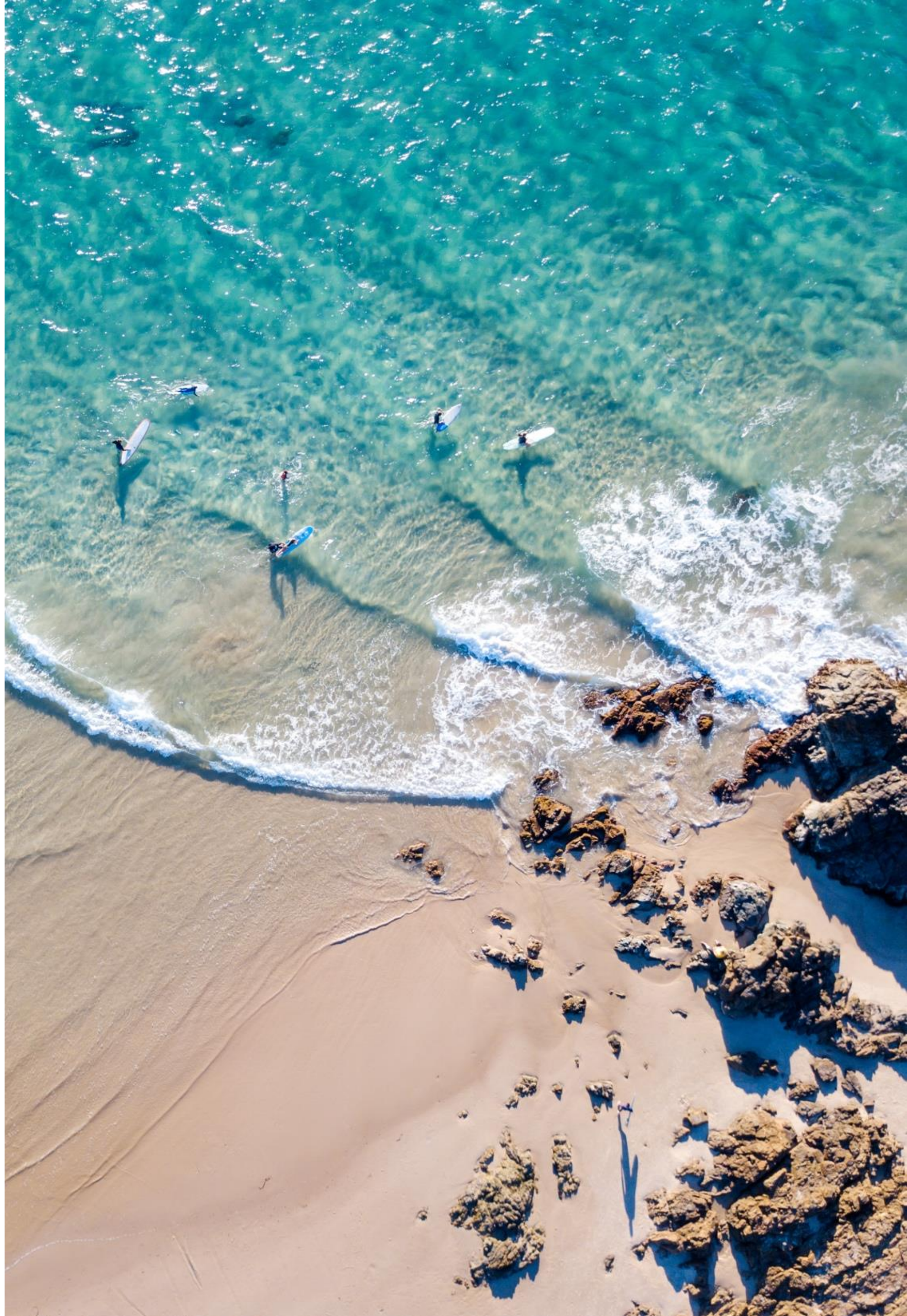
Simple Relaxation

Adventure

Nature

Discover

Indulge

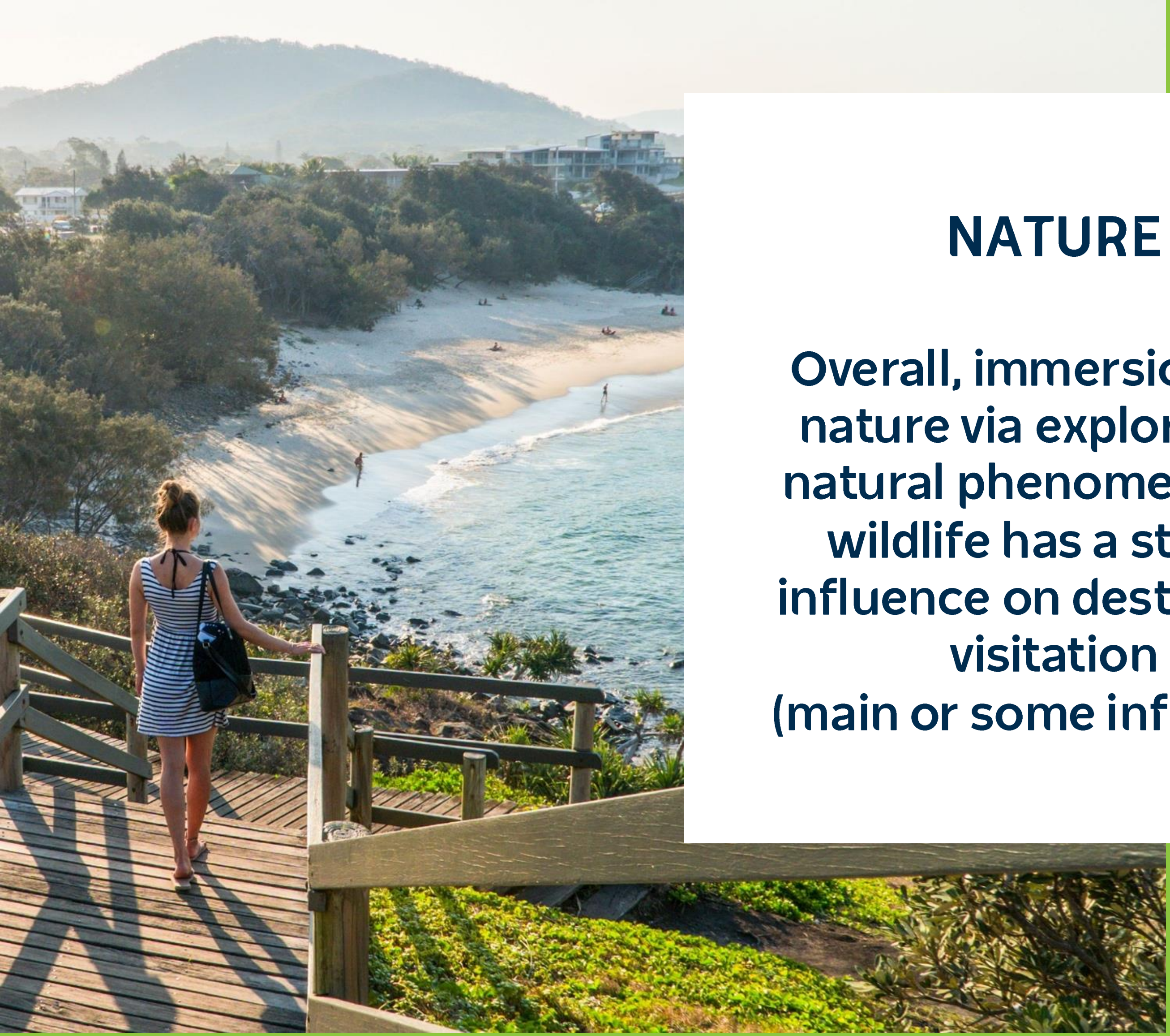


NSW as a travel destination is distinctive

We have a broad range of experiences…

Presents a **challenge** in building an identity but also highlights how we have **something for everyone,** which is a unique position in itself

Dining out, road trips & beaches appeal to most domestic travellers, highlighting their importance as offerings for travel destinations



NATURE

Overall, immersion into nature via exploration, natural phenomena and wildlife has a strong influence on destination visitation (main or some influence)

...with strong appeal for zoos, wildlife parks and road trips, particularly among young families

This experience generate high levels of interest and influence, indicating how harbour-based & coastline experiences can play an important role in driving travel intention

Tours and trips across different modes of travel have an influence on the destination they visit

TO VISIT A destination:
(the main reason/some influence)

About half of domestic travellers are interested in ocean cruising and river cruising/ houseboats

cross-sell opportunities beyond the popular experience extend to experience accommodation

JOURNEYS

Water-based trips is one area where we differentiate in category, highlighting how Sydney Harbour & the NSW Coastline play unique roles for us as a destination.

JOURNEYS: Road Trips

65%

Two-thirds of domestic travellers are interested in **road trips in NSW**

(% SOMEWHAT/HIGHLY LIKELY WITHIN THE NEXT TWO YEARS)

Total	65%
NSW Residents	81%
VIC Residents	60%
QLD Residents	65%
SA Residents	41%
WA Residents	46%

88% Agree that there are many experiences/ activities to do on a road trip across NSW

87% Planning a road trip holiday within NSW is relatively easy

85% You can always find accommodation options for road trips across NSW

78% Facilities across NSW are well equipped for road trips

Road Trippers are motivated by Exploration & Discovery, and time spent with Friends & Family

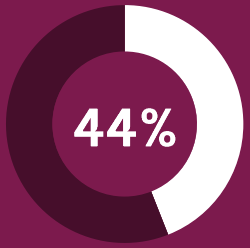
6.3 days

Length of trip consideration

More than 3 out of 5 say wellness is a key influence on destination choice:

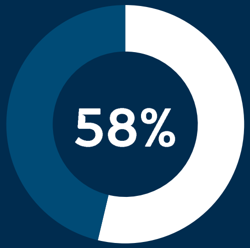
WELLNESS

Over half of domestic travellers are interested in Experience accommodation & hot springs/forest bathing

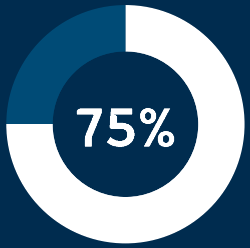


CULTURE & ABORIGINAL EXPERIENCES

Aboriginal food experiences	24%
Aboriginal art, craft or cultural displays	22%
Aboriginal guided tours	21%
Visiting Aboriginal sites or communities	20%
Aboriginal storytelling	19%
Craft workshops with Indigenous artisans	16%



Over half of domestic travellers are interested in agritourism food & drink events



3 in 4 trips that include agritourism activities visited regional Australia in 2024

Travellers that engaged in agritourism also engage in a higher number of trip activities

In addition to popular experiences, travellers are likely to be interested in:

- Exploring natural landmarks
- Experience accommodation

AGRITOURISM

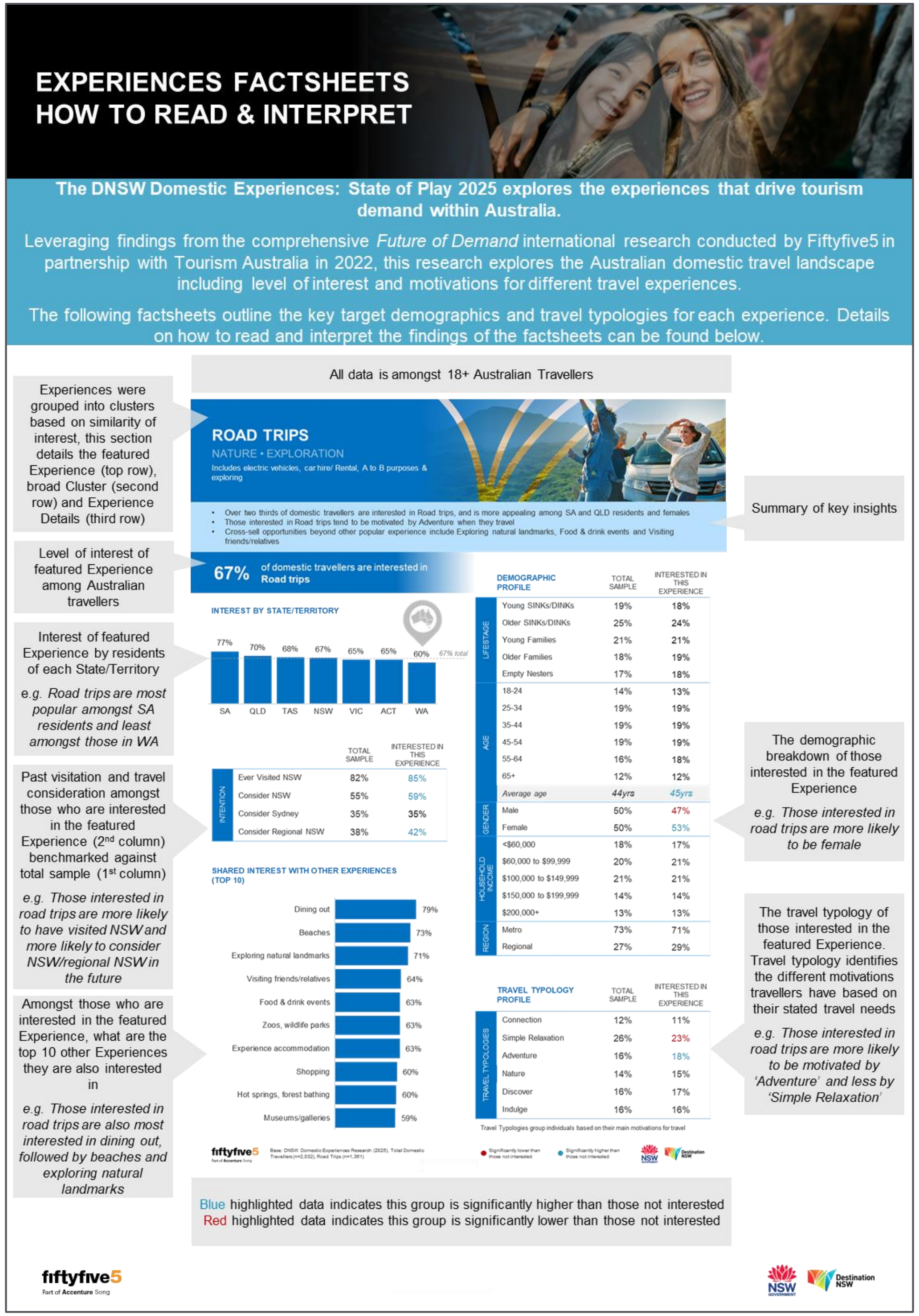
Visitors who engage in an agritourism activity while on their trip have higher than average spend per trip and spend per night than overall travellers within Australia.

Source: Tourism Research Australia, IVS and NVS 2024 . Destination NSW, Domestic Experiences Research – State of Play April 2025

DNSW Domestic Experiences factsheets walkthrough

All experience factsheets are available on the DNSW website, including a guide on how to interpret:

www.destinationnsw.com.au/insights/nsw-visitor-experiences-state-of-play



EXPERIENCES FACTSHEETS HOW TO READ & INTERPRET

The DNSW Domestic Experiences: State of Play 2025 explores the experiences that drive tourism demand within Australia.

Leveraging findings from the comprehensive *Future of Demand* international research conducted by Fiftyfive5 in partnership with Tourism Australia in 2022, this research explores the Australian domestic travel landscape including level of interest and motivations for different travel experiences.

The following factsheets outline the key target demographics and travel typologies for each experience. Details on how to read and interpret the findings of the factsheets can be found below.

All data is amongst 18+ Australian Travellers

Experiences were grouped into clusters based on similarity of interest, this section details the featured Experience (top row), broad Cluster (second row) and Experience Details (third row)

ROAD TRIPS

NATURE • EXPLORATION

Includes electric vehicles, car hire/ Rental, A to B purposes & exploring

- Over two thirds of domestic travellers are interested in Road trips, and is more appealing among SA and QLD residents and females
- Those interested in Road trips tend to be motivated by Adventure when they travel
- Cross-sell opportunities beyond other popular experience include Exploring natural landmarks, Food & drink events and Visiting friends/relatives

Summary of key insights

Level of interest of featured Experience among Australian travellers

67% of domestic travellers are interested in **Road trips**

Interest of featured Experience by residents of each State/Territory

e.g. Road trips are most popular amongst SA residents and least amongst those in WA

INTEREST BY STATE/TERRITORY

SA	QLD	TAS	NSW	VIC	ACT	WA
77%	70%	68%	67%	65%	65%	60%

67% total

Past visitation and travel consideration amongst those who are interested in the featured Experience (2nd column) benchmarked against total sample (1st column)

e.g. Those interested in road trips are more likely to have visited NSW and more likely to consider NSW/regional NSW in the future

INTENTION	TOTAL SAMPLE	INTERESTED IN THIS EXPERIENCE
Ever Visited NSW	82%	85%
Consider NSW	55%	59%
Consider Sydney	35%	35%
Consider Regional NSW	38%	42%

Amongst those who are interested in the featured Experience, what are the top 10 other Experiences they are also interested in

e.g. Those interested in road trips are also most interested in dining out, followed by beaches and exploring natural landmarks

SHARED INTEREST WITH OTHER EXPERIENCES (TOP 10)

Experience	%
Dining out	79%
Beaches	73%
Exploring natural landmarks	71%
Visiting friends/relatives	64%
Food & drink events	63%
Zoos, wildlife parks	63%
Experience accommodation	63%
Shopping	60%
Hot springs, forest bathing	60%
Museums/galleries	59%

The demographic breakdown of those interested in the featured Experience

e.g. Those interested in road trips are more likely to be female

DEMOGRAPHIC PROFILE		TOTAL SAMPLE	INTERESTED IN THIS EXPERIENCE
LIFESTAGE	Young SINKs/DINKs	19%	18%
	Older SINKs/DINKs	25%	24%
	Young Families	21%	21%
	Older Families	18%	19%
	Empty Nesters	17%	18%
AGE	18-24	14%	13%
	25-34	19%	19%
	35-44	19%	19%
	45-54	19%	19%
	55-64	16%	18%
	65+	12%	12%
	Average age	*44yrs*	*45yrs*
GENDER	Male	50%	47%
	Female	50%	53%
HOUSEHOLD INCOME	<$60,000	18%	17%
	$60,000 to $99,999	20%	21%
	$100,000 to $149,999	21%	21%
	$150,000 to $199,999	14%	14%
	$200,000+	13%	13%
REGION	Metro	73%	71%
	Regional	27%	29%

The travel typology of those interested in the featured Experience. Travel typology identifies the different motivations travellers have based on their stated travel needs

e.g. Those interested in road trips are more likely to be motivated by 'Adventure' and less by 'Simple Relaxation'

TRAVEL TYPOLOGY PROFILE	TOTAL SAMPLE	INTERESTED IN THIS EXPERIENCE
Connection	12%	11%
Simple Relaxation	26%	23%
Adventure	16%	18%
Nature	14%	15%
Discover	16%	17%
Indulge	16%	16%

Travel Typologies group individuals based on their main motivations for travel

Blue highlighted data indicates this group is significantly higher than those not interested
Red highlighted data indicates this group is significantly lower than those not interested

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FARM EXPERIENCES

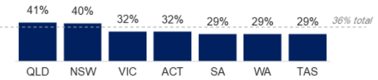
AGRITOURISM • FOOD & FARM IMMERSION

Includes farm gate tour/demonstrations, farm stay, pick your own & farm shops

- Over 1-in-3 domestic travellers are interested in farm experiences, with significantly stronger interest among QLD & NSW residents
- This audience skews higher among younger families, 25-44-year-olds & females
- Those interested in farm experiences are motivated by nature when it comes to travel
- The strongest cross-sell opportunities relate to dining out, road trips and exploring natural landmarks

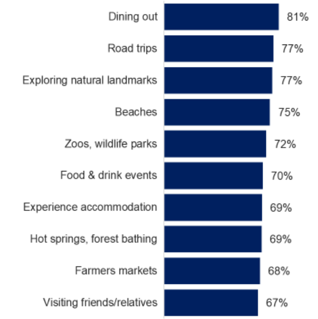
36% of domestic travellers are interested in farm experiences

INTEREST BY STATE/TERRITORY



		TOTAL SAMPLE	INTERESTED IN THIS EXPERIENCE
INTENTION	Ever Visited NSW	82%	86%
	Consider NSW	55%	58%
	Consider Sydney	35%	38%
	Consider Regional NSW	38%	45%

SHARED INTEREST WITH OTHER EXPERIENCES (TOP 10)



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	25-34	19%	24%
	35-44	19%	25%
	45-54	19%	16%
	55-64	16%	13%
	65+	12%	8%
	Average age	*44yrs*	*41yrs*
GENDER	Male	50%	42%
	Female	50%	58%
HOUSEHOLD INCOME	<$60,000	18%	16%
	$60,000 to $99,999	20%	19%
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Travel Typologies group individuals based on their main motivations for travel

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Base: DNSW Domestic Experiences Research (2025), Total Domestic Travellers (n=2,032), Farm experiences (n=727)

● Significantly lower than those not interested ● Significantly higher than those not interested

NSW Destination NSW

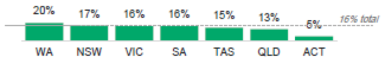
MOUNTAIN BIKING

OUTDOOR ACTIVITY • CYCLING

- More than 1-in-10 domestic travellers are interested in mountain biking, and lower interest among ACT residents
- This audience is skewed towards SINKs/DINKs, young families, 18-34-year-olds, males & $200k+ income households
- Travellers who seek connection, adventure & nature when travelling are more likely to be interested in mountain biking
- Cross-sell opportunities include road trips, dining out, beaches and exploring natural landmarks

16% of domestic travellers are interested in mountain biking

INTEREST BY STATE/TERRITORY



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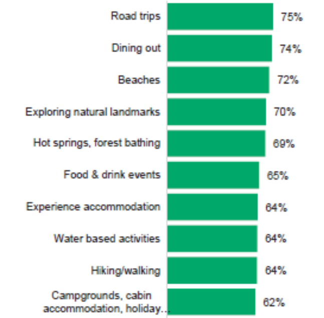

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Travel Typologies group individuals based on their main motivations for travel

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Base: DNSW Domestic Experiences Research (2025), Total Domestic Travellers (n=2,032), Mountain Biking (n=317)

● Significantly lower than those not interested ● Significantly higher than those not interested

NSW Destination NSW

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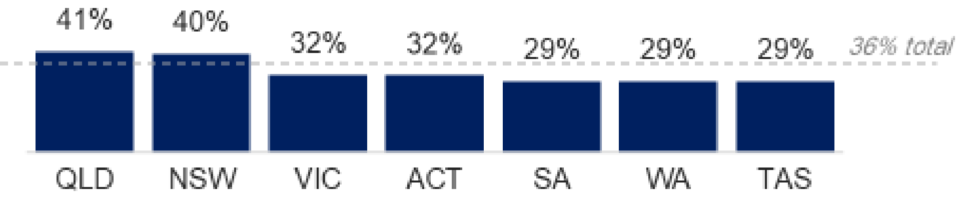
36% of domestic travellers are interested in farm experiences

Overview of the experience and highlighting key points on the page

INTEREST BY STATE/TERRITORY



Overall % of domestic travellers that indicate interest for this experience…

…and it differs for each state/territory

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Domestic traveller demographic profile among those interested in the experience, compared to total travellers

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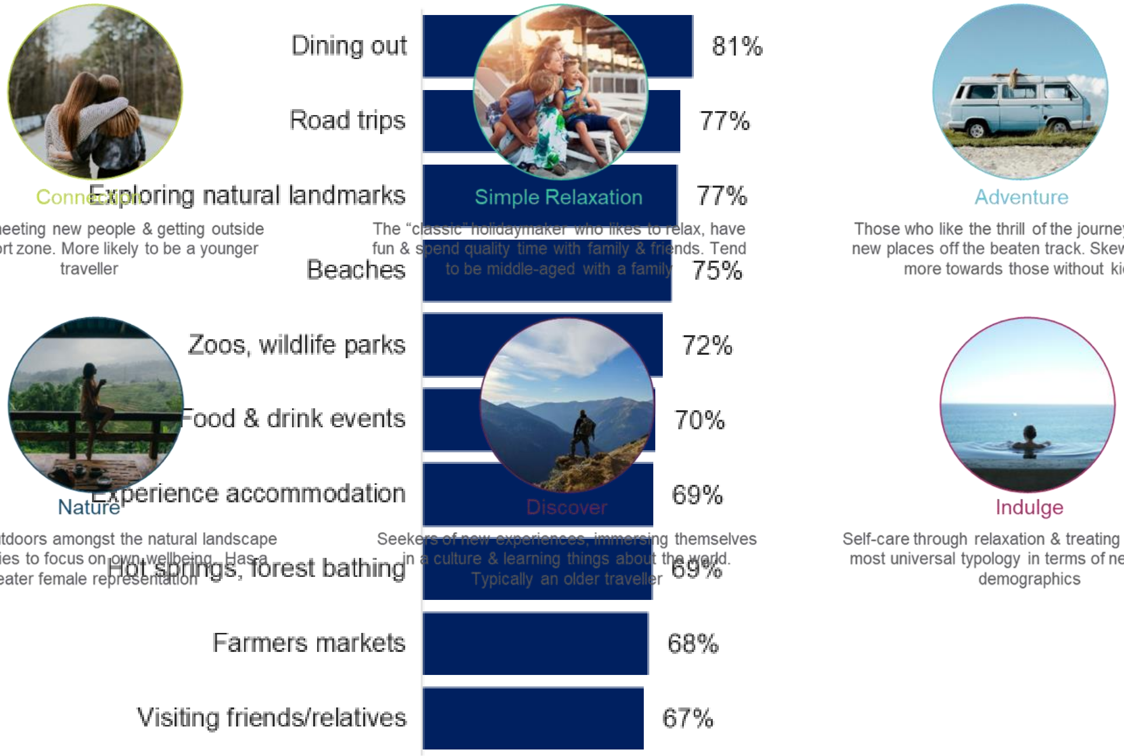
Other experiences domestic travellers are interested in as well as the featured experience

SHARED INTEREST WITH OTHER EXPERIENCES (TOP 10)



Connection
Driven by meeting new people & getting outside their comfort zone. More likely to be a younger traveller

Simple Relaxation
The "classic" holidaymaker who likes to relax, have fun & spend quality time with family & friends. Tend to be middle-aged with a family

Adventure
Those who like the thrill of the journey, seeing new places off the beaten track. Skews slightly more towards those without kids

Nature
Enjoy time outdoors amongst the natural landscape & opportunities to focus on own wellbeing. Has a greater female representation

Discover
Seekers of new experiences, immersing themselves in a culture & learning things about the world. Typically an older traveller

Indulge
Self-care through relaxation & treating oneself. The most universal typology in terms of needs across demographics

Domestic traveller travel typology profile among those interested in the experience, compared to total travellers

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- Travellers who seek connection, adventure & nature when travelling are more likely to be interested in mountain biking
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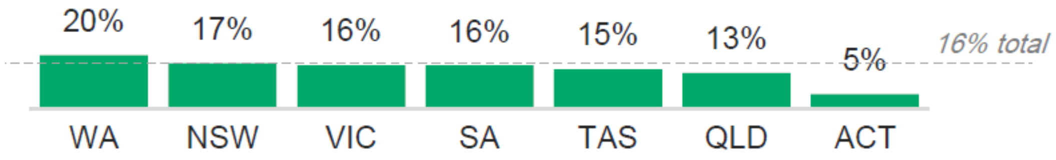
16% of domestic travellers are interested in **mountain biking**

Overview of the experience and highlighting key points on the page

INTEREST BY STATE/TERRITORY



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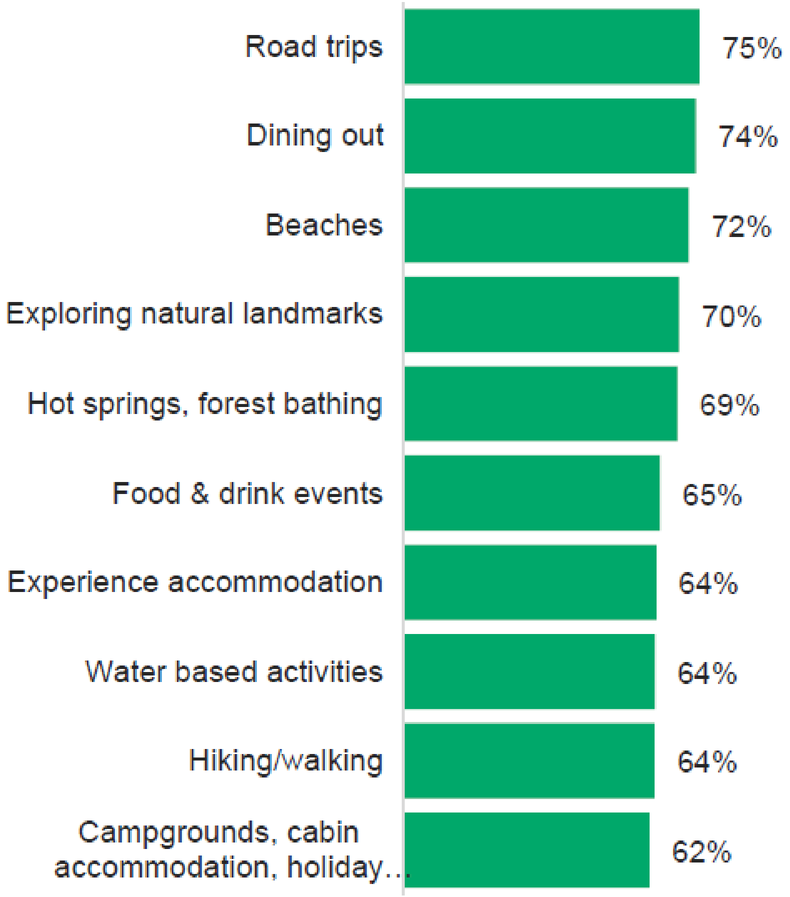

Adventure

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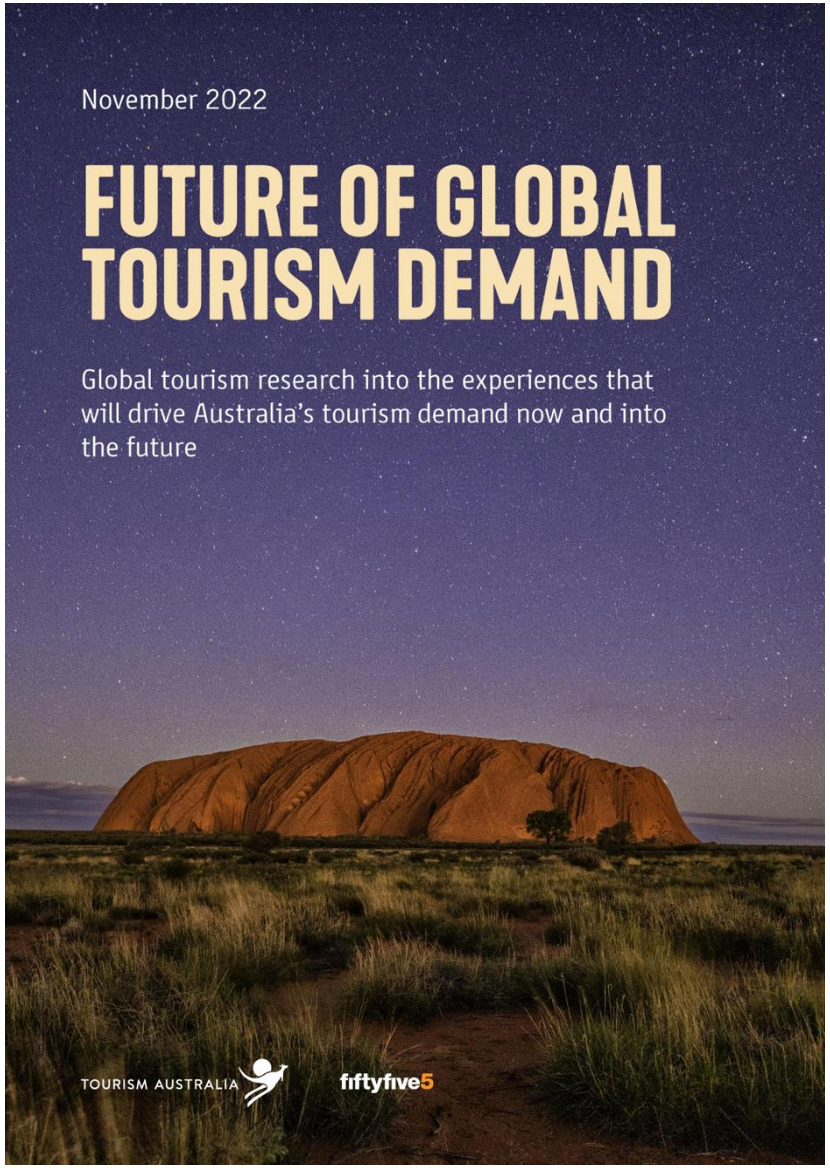
Nature	14%	19%
Discover	16%	12%
Indulge	16%	14%

Travel Typologies group individuals based on their main motivations for travel

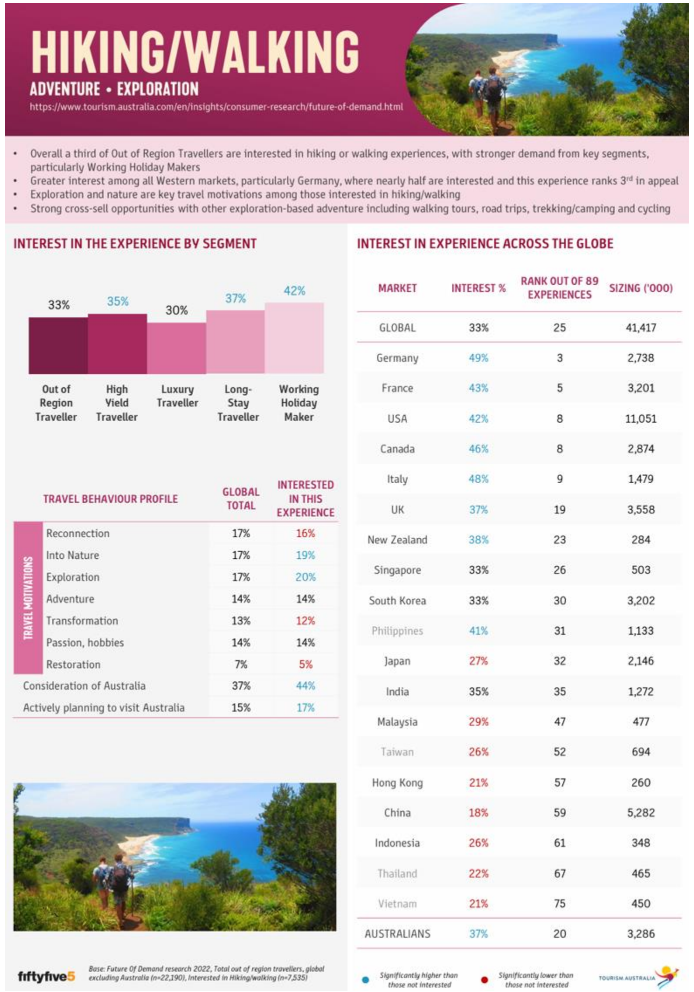
Other sources of useful data and insights

If you want to know more about international visitors and which experiences appeal:

https://www.tourism.australia.com/en/insights.html



89 experience factsheets



HIKING/WALKING

ADVENTURE • EXPLORATION

https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html

- Overall a third of Out of Region Travellers are interested in hiking or walking experiences, with stronger demand from key segments, particularly Working Holiday Makers
- Greater interest among all Western markets, particularly Germany, where nearly half are interested and this experience ranks 3rd in appeal
- Exploration and nature are key travel motivations among those interested in hiking/walking
- Strong cross-sell opportunities with other exploration-based adventure including walking tours, road trips, trekking/camping and cycling

INTEREST IN THE EXPERIENCE BY SEGMENT

Out of Region Traveller	High Yield Traveller	Luxury Traveller	Long-Stay Traveller	Working Holiday Maker
33%	35%	30%	37%	42%

	TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
TRAVEL MOTIVATIONS	Reconnection	17%	16%
	Into Nature	17%	19%
	Exploration	17%	20%
	Adventure	14%	14%
	Transformation	13%	12%
	Passion, hobbies	14%	14%
	Restoration	7%	5%
	Consideration of Australia	37%	44%
	Actively planning to visit Australia	15%	17%

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	33%	25	41,417
Germany	49%	3	2,738
France	43%	5	3,201
USA	42%	8	11,051
Canada	46%	8	2,874
Italy	48%	9	1,479
UK	37%	19	3,558
New Zealand	38%	23	284
Singapore	33%	26	503
South Korea	33%	30	3,202
Philippines	41%	31	1,133
Japan	27%	32	2,146
India	35%	35	1,272
Malaysia	29%	47	477
Taiwan	26%	52	694
Hong Kong	21%	57	260
China	18%	59	5,282
Indonesia	26%	61	348
Thailand	22%	67	465
Vietnam	21%	75	450
AUSTRALIANS	37%	20	3,286

fiftyfive5 Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Hiking/walking (n=7,535)

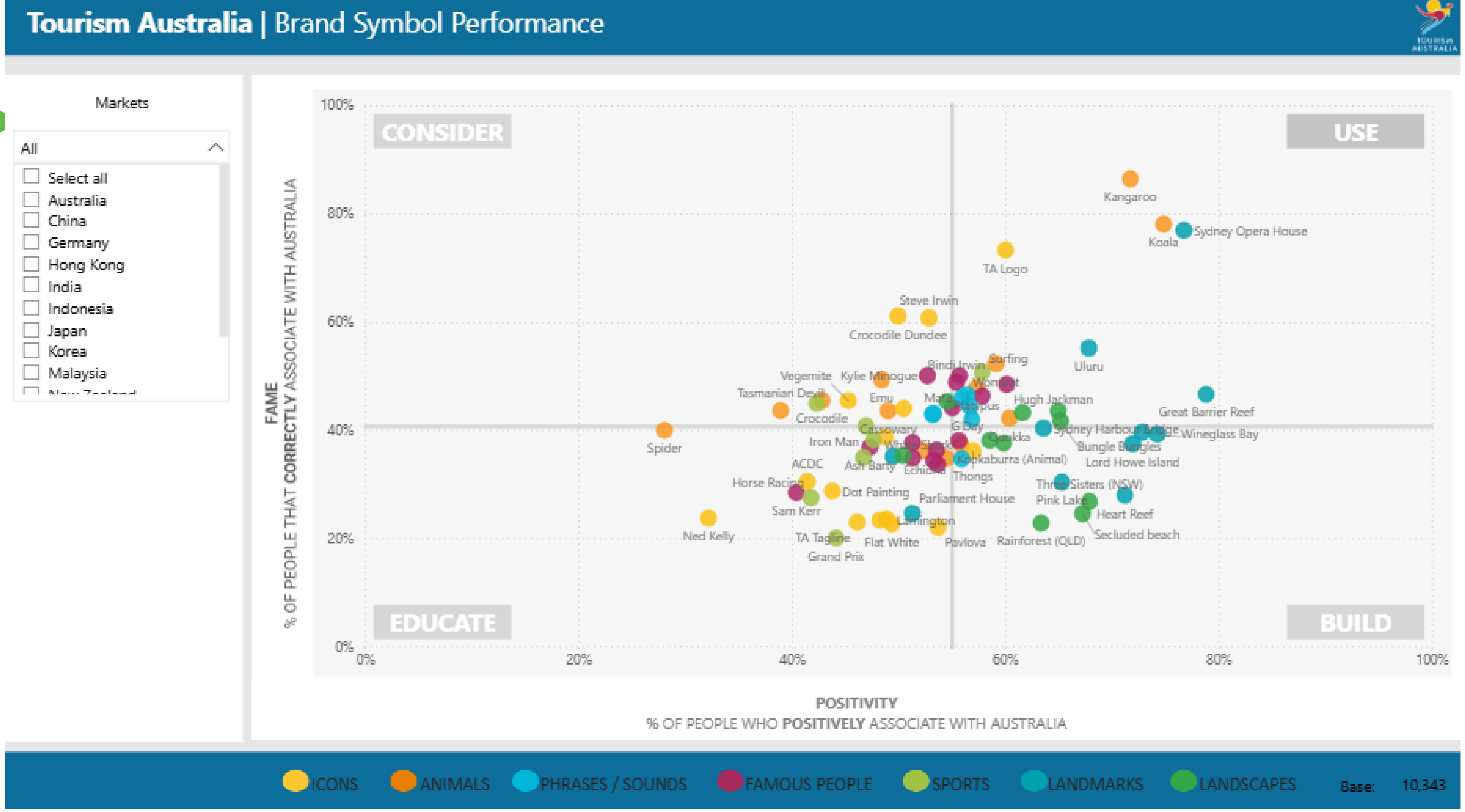
Significantly higher than those not interested

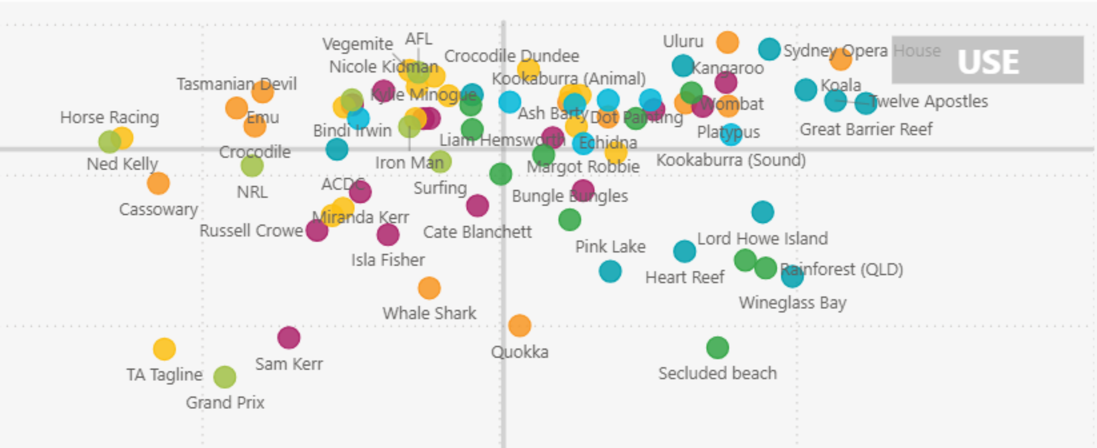
Significantly lower than those not interested

TOURISM AUSTRALIA

Distinctive Brand Assets to leverage in your communications:

https://www.tourism.australia.com/en/insights.html





Each destination has a unique offer … but Australian Domestic traveller needs are fairly consistent.

So leverage other sources of insight where possible …

WHAT TYPES OF TRIPS DO AUSTRALIANS TAKE?

In 2022, Tourism WA commissioned Roy Morgan to conduct a study based on trips taken by Australians to better understand this important visitor market. The resulting data was divided into six segments and these trip types help inform our marketing efforts. Beyond identifying the six trip types, we have profiled the target market for each trip covering demographics, psychographics, and media consumption. The additional profiles help define who is most likely to take these trips, interstate or intrastate travellers.

Premium nature

A Premium Nature trip is a high-activity immersion in untouched nature offering unique, premium experiences.

PDF | 550.6 KB — Download

Luxe culture

A luxury escape typically staying at 4 or 5 star hotels and resorts, focusing on restaurants, shopping and arts and culture.

PDF | 742.1 KB — Download

City social

A city social trip is getting together with friends and having a good time, soaking up the nightlife and city energy.

PDF | 863.0 KB — Download

FAMILY SEGMENT SUMMARY

WHO ARE THEY?

Families consist of parents mostly aged between 30 and 54 years. Seven in ten are travelling with at least one child under the age of 14 years.

Families are more likely to be motivated by good value for money and the chance to spend quality time with family and friends.

MARKET SIZE TO QUEENSLAND

Annual Visitors	2.52 Million
Annual Visitor Expenditure	$4.97 Billion

HOLIDAY VISITATION TO QLD

75%	$1,971	4.5 NIGHTS
are aged 30-54 years	average spend per trip	average length of stay

TRAVEL NEEDS AND EXPERIENCES

- Families are looking for a relaxing and fun holiday to help them reconnect with one another and spend quality time together. Family travellers are motivated by good value for money.
- Reef, beaches and islands, natural wonders and theme parks are the most popular experiences within families.
- They want a combination of experiences that are exciting and fun, as well as something the whole family can enjoy (including parents). Experiences should also focus on the beachy, populous and easy to get to parts of Queensland.
- When planning a trip, families want to ensure that every aspect of the holiday meets their needs, e.g. activities are age-appropriate for children, whether locations are stroller accessible and safe, if there are opportunities for kids to rest, and if suitable food options are available.

OPPORTUNITIES FOR QLD

- Theme Parks are a key draw for Queensland. Zoos, wildlife parks and aquariums, as well as outdoor adventure are also more appealing to families than any other segment.
- In creative, demonstrate how a Queensland holiday can bring families closer through shared experiences while offering value for money as a safe, accessible destination.
- Kid friendly/gamification of experiences

TRAVEL TRIGGERS

- School holidays are the main trigger, with school aged children, most don't want to travel outside of these periods.
- Often travel to see extended family; they also value simply reconnecting with one another. Working parents want to spend quality time with their family.

TIME SPENT CONSUMING MEDIA

- Internet Any Device: U5 yrs: 22.0 hrs/wk; 5-11 yrs: 21.7 hrs/wk
- Internet Mobile Phone: U5 yrs: 12.0 hrs/wk; 5-11 yrs: 11.6 hrs/wk
- Social Networks: U5 yrs: 7.4 hrs/wk; 5-11 yrs: 6.7 hrs/wk
- Online Video: U5 yrs: 5.1 hrs/wk; 5-11 yrs: 4.6 hrs/wk
- TV: SVOD: U5 yrs: 7.7 hrs/wk; 5-11 yrs: 7.5 hrs/wk; FTA: U5 yrs: 3.9 hrs/wk; 5-11 yrs: 4.4 hrs/wk

Sources: NVS YE December 2024, Holiday Visitors. FiftyFive5, Consumer Value Proposition Research, September 2025. Roy Morgan Single Source Australia, Jul'23-Jun'24 + iCCS

THE LAST 5 MINUTES

Experiences are (the) key to visitor expenditure growth

Trip needs fluctuate, traveller preferences prevail

Food & drink, beaches and road trips appeal to most travellers

Targeted experience engagement will drive destination & experience choice

Data and insights can help you, in whatever part of the industry you're in

Thank you