

THE FUTURE OF TOURISM DEMAND

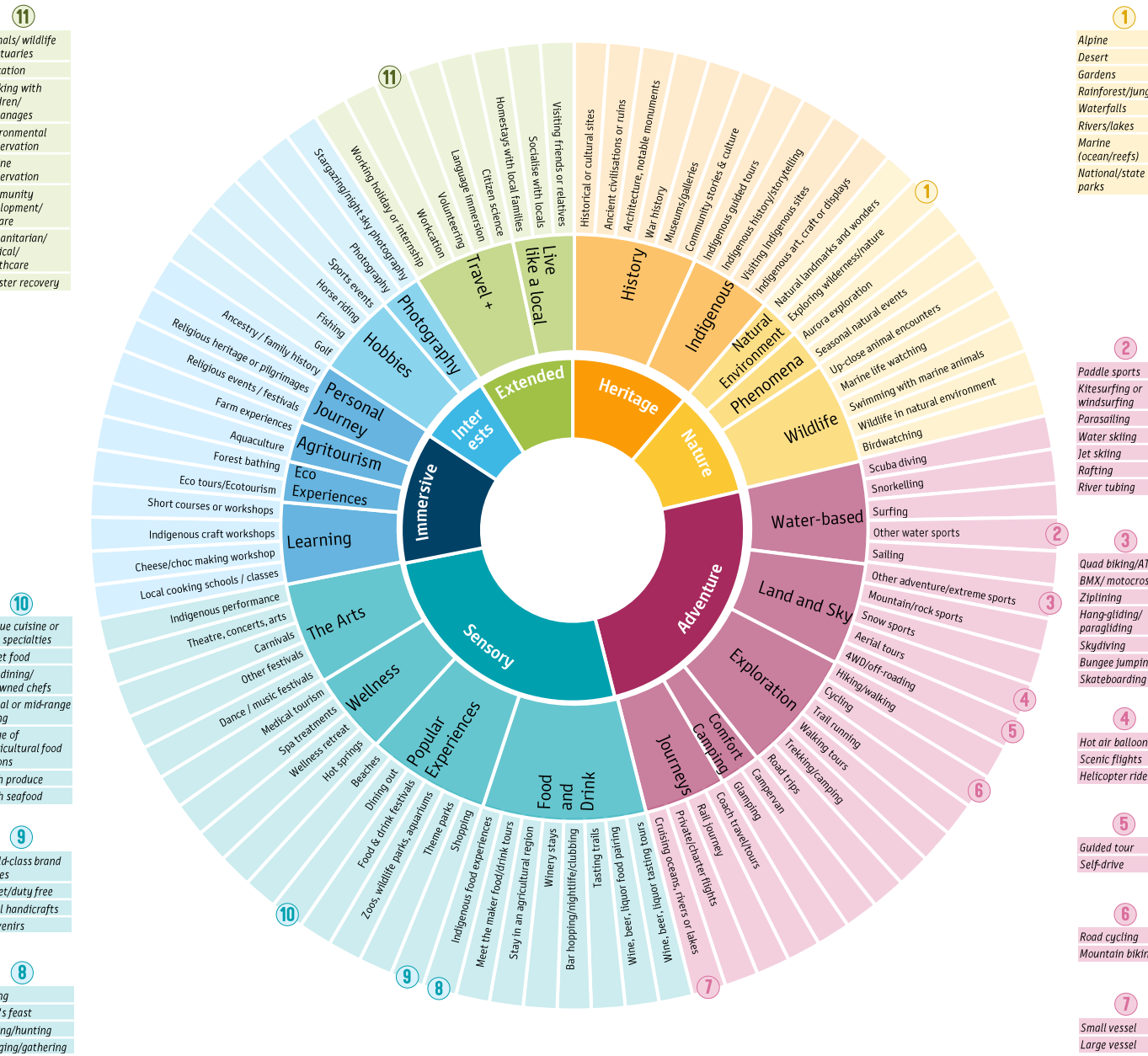


Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. Based on qualitative research and a global survey of 23,771 travellers across 20 markets, the research measured interest in 143 global tourism experiences (89 primary and 54 sub-experiences).

EXPERIENCE SECTOR MAPPING

To create a traveller-led view of tourism sectors, the 89 tested experiences were clustered based on overlapping traveller demand, i.e. experiences sharing a high degree of crossover grouped together most closely. This analysis revealed seven broad ‘clusters’ and 22 sub-clusters of related experiences, which can be used to target travellers, destinations and itineraries effectively. Individual experiences are explored in detail through the following infographics.

HERITAGE	NATURE	ADVENTURE	SENSORY	IMMERSIVE	INTERESTS	EXTENDED
Experiencing a destination’s history through its places and people	Immersion into nature via landmarks and wildlife	Activity and exploration	Enjoyment via good food and drink, sightseeing and culture	Learning, development and education	Hobbies and passion points	Full immersion into local culture



ABOUT THIS RESEARCH



Given the pace and scale of change in Australia's tourism industry, a view on current and future demand patterns is timely. The *Future of Tourism Demand* is the most comprehensive view on global demand undertaken by Tourism Australia to date, developed with the sole intent of helping our industry find and convert demand in this crucial recovery moment.

Tourism was Australia's second largest service export before the pandemic, employing one in every twelve Australians. But while tourism is big business, the industry is made up of around 300,000 very small businesses. Recognising the lean nature of many tourism businesses, we have endeavoured to provide a high level of insights across all sectors.

This is a rich data source, but we realise it is also relatively complex. We've tried to simplify it as much as possible and give examples of how to use the insights. If you need a hand as you review the research, please reach out to insights@tourism.australia.com.

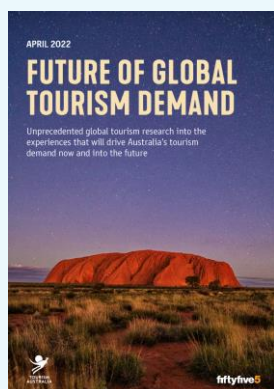
The research covers 143 experiences across 20 markets and four target audiences: the High Yield Traveller, Premium, Working Holiday Makers and a broader Long Stay audience. There were also three deep dive sections covering sustainable tourism, Indigenous insights and accessible travel.

This research was delivered with the support of state and territory tourism organisations and tourism industry operators from across Australia and our key markets. On behalf of the Tourism Australia team, our sincere thanks for your support and contribution to this work.

We sincerely hope that the insights in this research will help operators make better and more successful business decisions, and aid Australia's tourism industry to be even more competitive on the world stage than ever before.

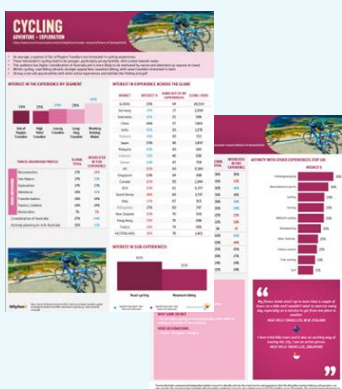
To review the full report, experience fact sheets and market snapshots, visit <https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html>

MAIN REPORT



The main report brings together the wealth of data and insights from the research into a single, detailed document.

EXPERIENCE FACT SHEETS



Interest in the experience globally, by segment and by market; profiling of those interested; and cross-sell and partnership opportunities.

MARKET SNAPSHOTS



A snapshot for each of the 20 markets, plus a global summary, showing their interest in experiences and sub-experiences.

THE FUTURE OF TOURISM DEMAND



RESEARCH METHODOLOGY AND TIMINGS

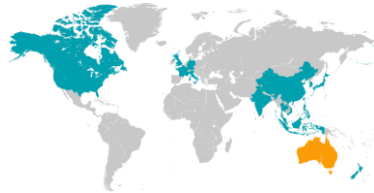
Qualitative exploration | February-March 2022

Online community and focus groups with 240 High Yield Travellers across **10** key markets



Quantitative validation | April-May 2022

Online survey, 20 minutes in length, with 23,771 Out of Region travellers across **20** markets



MARKET COVERAGE

Tourism Australia remains committed to the core markets where it currently concentrates effort, as these markets represent the best opportunities for Australian tourism. Markets where Tourism Australia is active are China, Japan, India, Singapore, South Korea, the UK, the USA, Germany, Indonesia, Malaysia, France, Canada, New Zealand and Italy.

While Tourism Australia will continue to focus on its 15 markets, this research extends beyond our core international markets to include emerging markets, as well as the domestic Australian market, because Tourism Australia strives to provide tourism operators with the tools and information they need to make the best international marketing decisions for their businesses.

All markets covered by this research are listed below (with emerging markets in grey). Access the dedicated market snapshot by clicking the relevant market name.

China	Japan	India	Singapore	South Korea
UK	USA	Germany	Indonesia	Malaysia
France	Canada	New Zealand	Italy	Hong Kong (SAR)
Taiwan	Philippines	Vietnam	Thailand	Australia

INTERPRETATION NOTES WHEN READING THE INFOGRAPHIC SUMMARIES

- Interest in the experiences should be interpreted as:
 - Broad claimed interest**, recognising that not all will convert or already engage in these activities when travelling.
 - Global interest potential**, i.e. not specific to engaging in the experience in Australia, and not all travellers interested in the experience are considering or will travel to Australia.
- Understanding global and market-level interest:
 - Global data** is an average of 19 markets (excluding Australia), with all markets weighted equally.
 - Differing survey response styles across markets means that care should be taken in comparing **market-level** interest levels (percentage interested in each experience) between markets.
 - Ranking analysis** (showing where each market ranked a particular experience ranked out of the 89 experiences in each market) has been included to provide a more objective basis for comparison between markets. The market data shown in the experience fact sheets is sorted on this column.
- Additional resources for understanding and interpreting the data contained in the market snapshots:
 - A 'how-to' guide, showing an example market snapshot marked up with interpretation of various figures, included in this guide.
 - Key take-outs highlighted via insights on individual market snapshots.

MARKET SNAPSHOTS: HOW TO READ AND INTERPRET



This information contained in this fact sheet relates to experiences of interest to Out of Region travellers from the **USA** market.

The 7 main clusters from the Experience Sector Wheel are shown here, and experiences throughout the chart below are colour-coded based on the cluster they're classified within.

USA INTEREST IN TOURISM EXPERIENCES

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

- The top 5 experiences in the US market are all sensory: dining out, beaches, food and drink festivals and shopping.
- Exploration-based forms of adventure are also in demand in the US market, particularly activities like ziplining and 4WD off-roading.

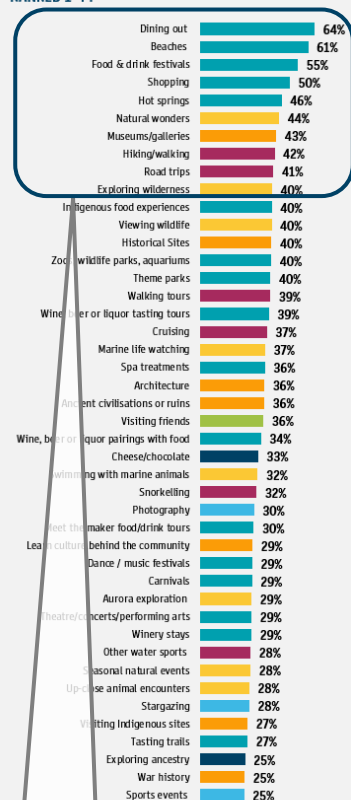
Each market snapshot includes summary insights highlighted in the banner.

The 89 main experiences tested are displayed in rank order, from highest to lowest interest level within the market.

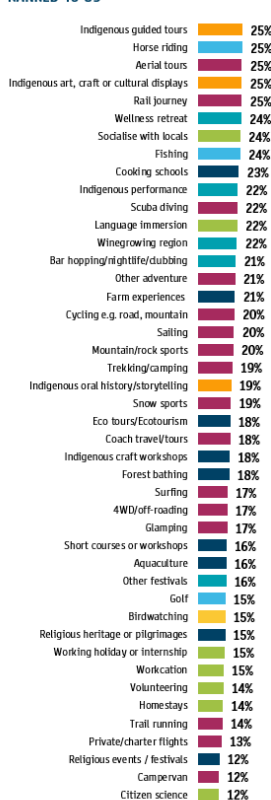
30% of the US market are interested in waterfalls, making this the most popular form of *exploring nature or wilderness areas* among US travellers.

The second page of the snapshots show this market's interest in *sub-experiences*, i.e. more granular forms of some of the main experiences. These are displayed in cluster order.

RANKED 1-44



RANKED 45-89

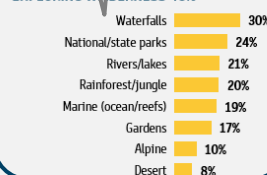


USA INTEREST IN TOURISM SUB-EXPERIENCES

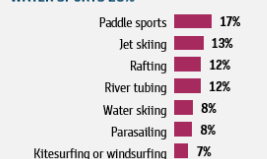
<https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html>

- The specific dining experiences attracting greatest US interest are street food and local specialties, pointing to the importance of *place*.
- Souvenirs and local handicrafts are the most popular forms of shopping, similarly highlighting a demand for local products.
- The US market shows a preference for ziplining over other forms of extreme sport.

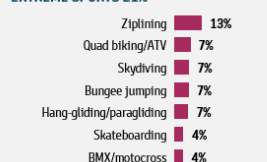
EXPLORING WILDERNESS 40%



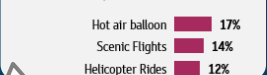
WATER SPORTS 28%



EXTREME SPORTS 21%



AERIAL TOURS/FLIGHTS 25%



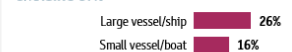
4WD/OFF-ROADING 17%



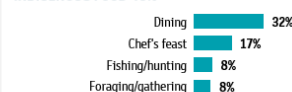
CYCLING 20%



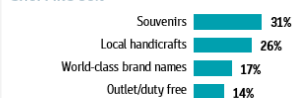
CRUISING 37%



INDIGENOUS FOOD 40%



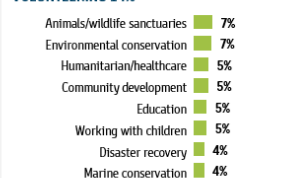
SHOPPING 50%



DINING OUT 64%



VOLUNTEERING 14%



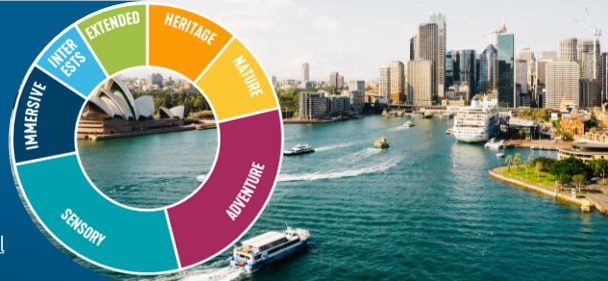
The top 5 experiences with highest levels of interest among US Out of Region Travellers are all **Sensory**. Dining out is most popular, with 64% of US travellers interested, followed by beaches (61% interested). **Nature, Heritage** and **Adventure** experiences also rank in this market's top 10 experiences.

Within the US market, medical tourism (a **Sensory** experience from the Wellness sub-cluster) attracts the lowest level of interest of the 89 experiences tested, with 10% of US Out of Region Travellers interested.

Overall, 25% of the US market is interested in aerial tours of flights (an **Adventure** experience from the Land and Sky sub-cluster). 17% of US Out of Region Travellers are specifically interested in hot air ballooning, 14% in scenic flights, and 12% in helicopter rides.

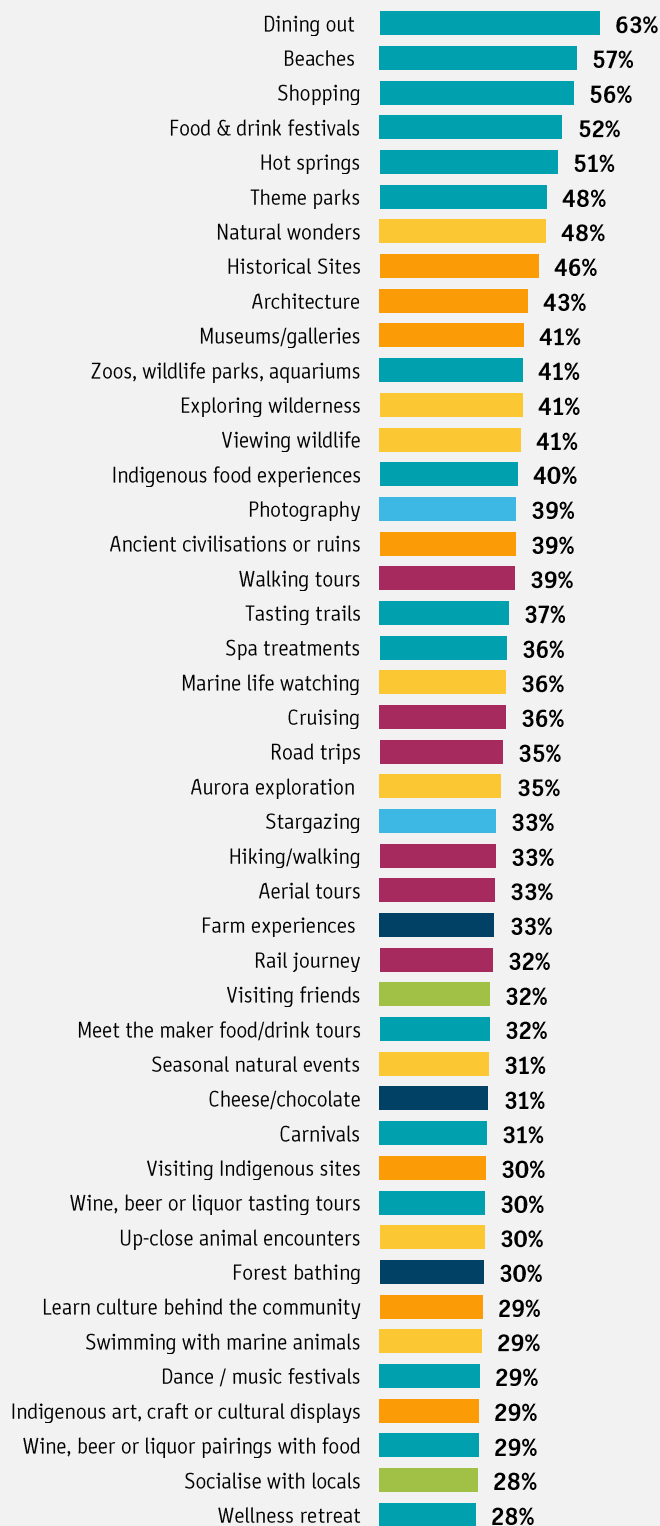
GLOBAL (EXCL. AUS) INTEREST IN TOURISM EXPERIENCES

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

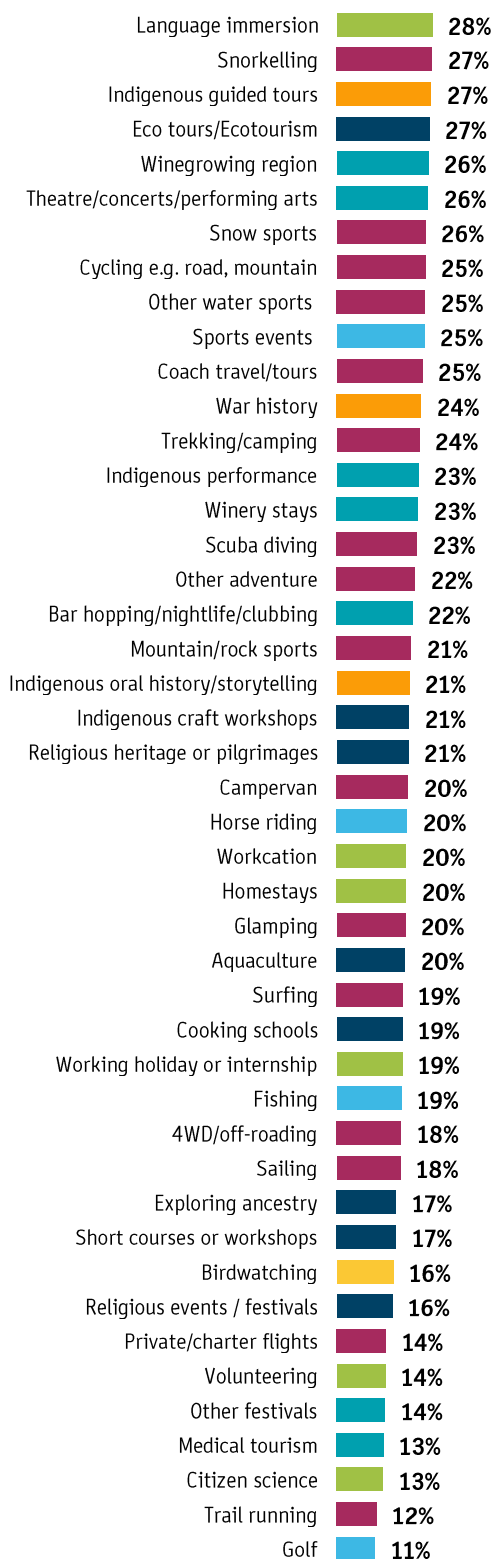


- The top 6 experiences in greatest demand globally are all sensory, led by dining out, beaches, shopping, food and drink festivals, hot springs and theme parks
- Nature- and heritage-based experiences round out the top 10

RANKED 1-44



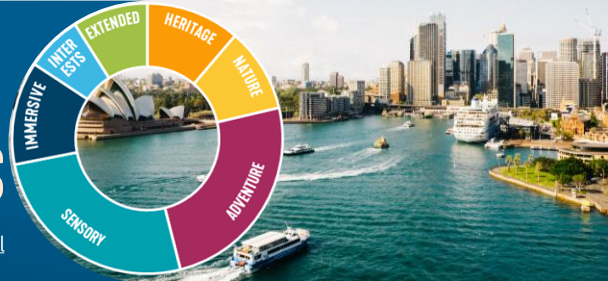
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190).

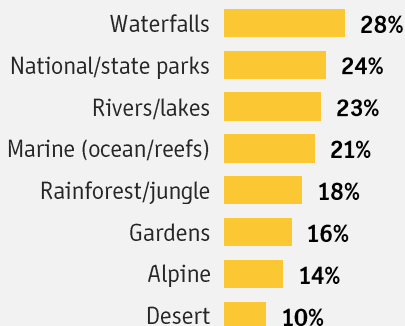
GLOBAL (EXCL. AUS) INTEREST IN TOURISM SUB-EXPERIENCES

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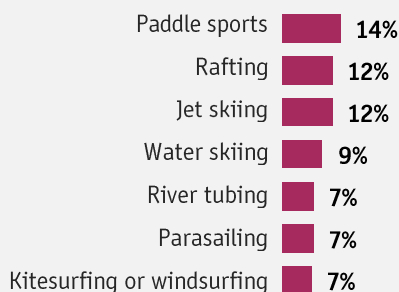


- The specific dining experiences in greatest demand globally are street food and local specialties, pointing to the importance of *place*
- Souvenirs and local handicrafts are the most popular forms of shopping, similarly highlighting a demand for local products
- At a global level, large-vessel cruising attracts greater demand than small-vessel cruising

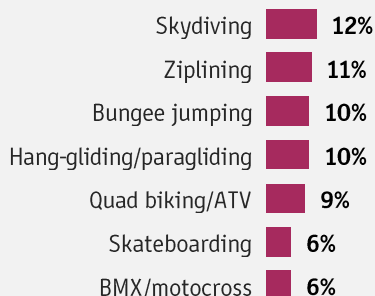
EXPLORING WILDERNESS 41%



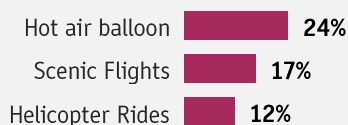
WATER SPORTS 25%



EXTREME SPORTS 22%



AERIAL TOURS/FLIGHTS 33%



4WD/OFF-ROADING 18%



CYCLING 25%



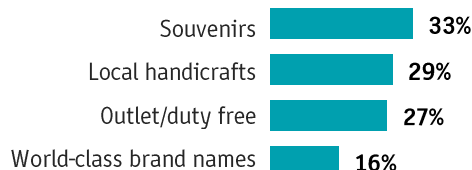
CRUISING 36%



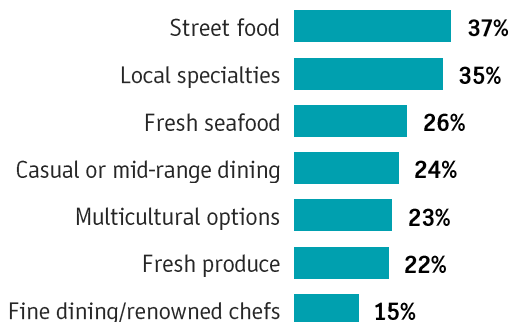
INDIGENOUS FOOD 40%



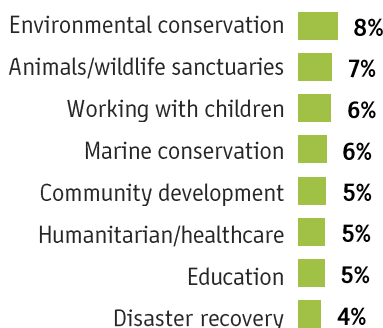
SHOPPING 56%



DINING OUT 63%

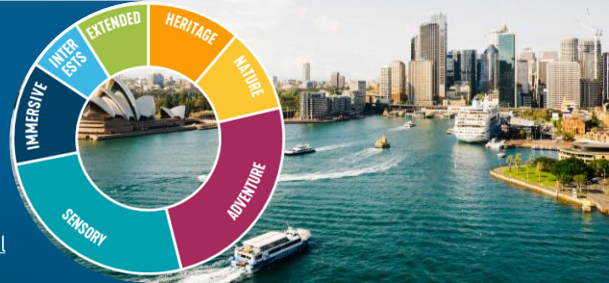


VOLUNTEERING 14%



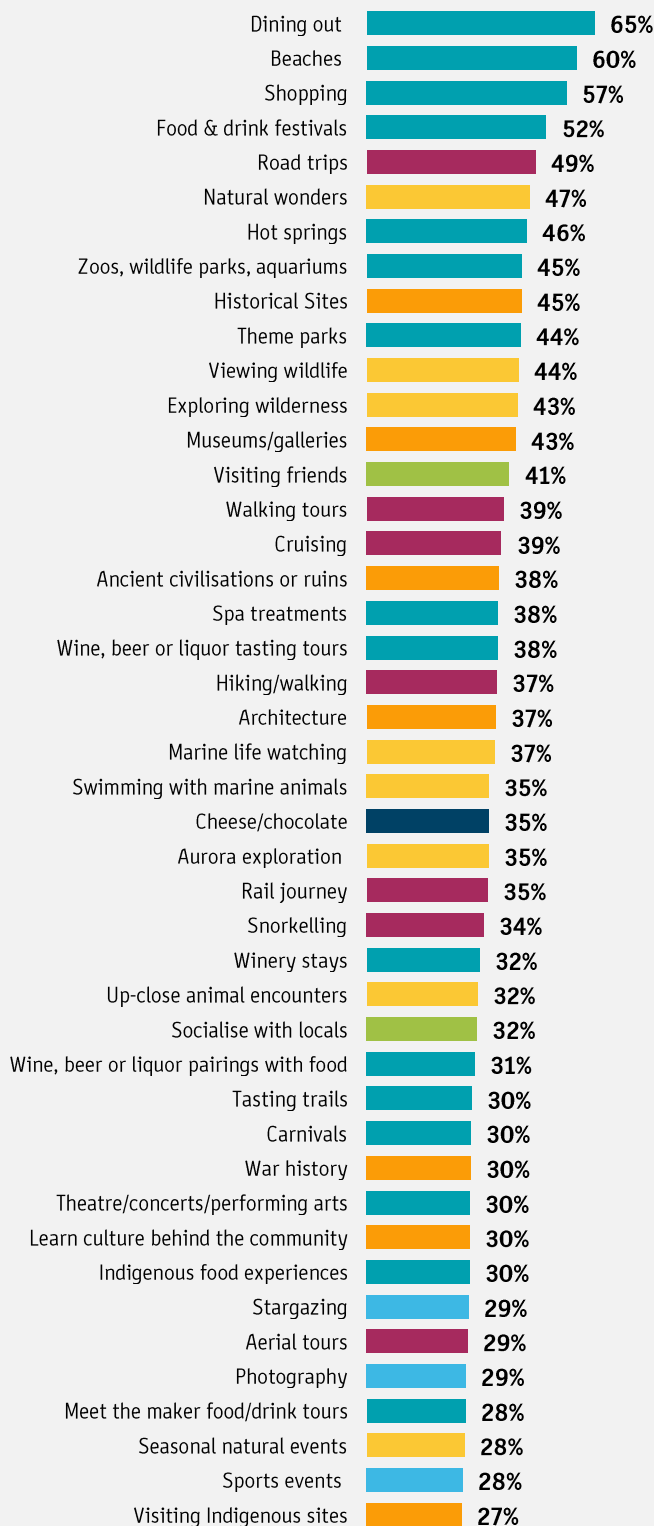
AUSTRALIA INTEREST IN TOURISM EXPERIENCES

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

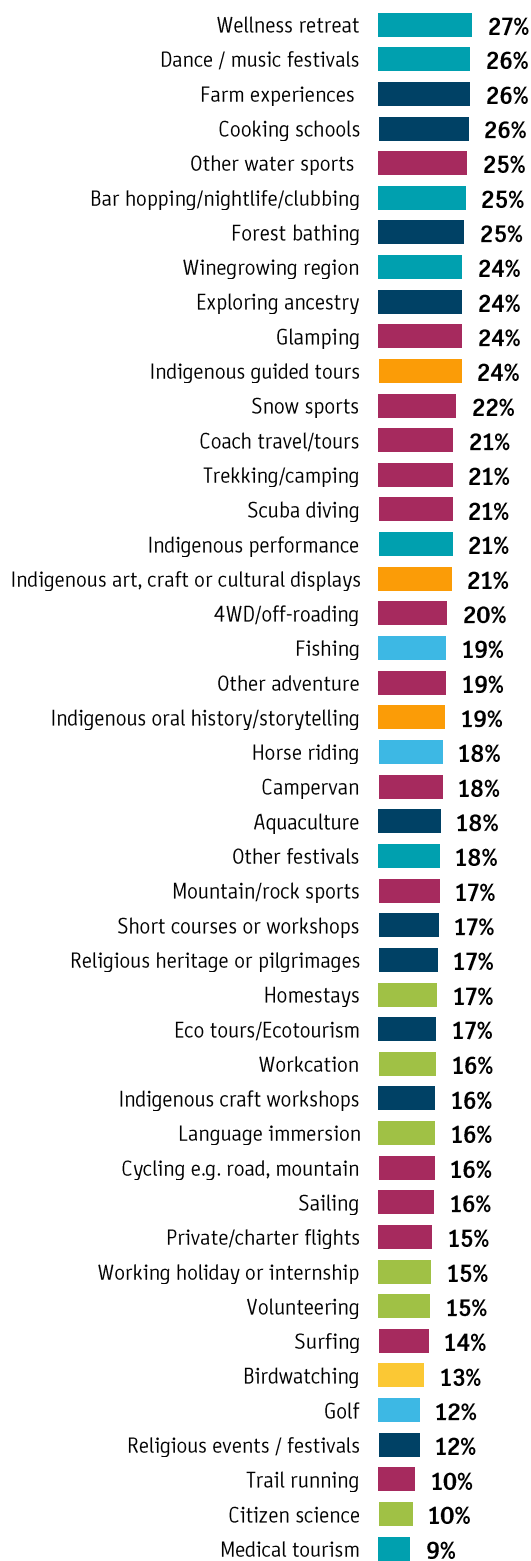


- Similar to other global markets, popular sensory experiences dominate in interest among Australians
- Australians also have very strong interest in road trips
- Other soft adventure activities such as walking tours and cruise also feature prominently

RANKED 1-44



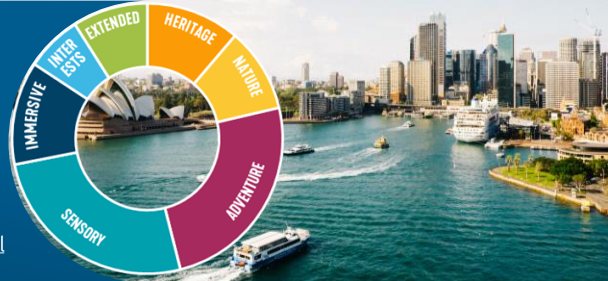
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Australia (n=1,543).

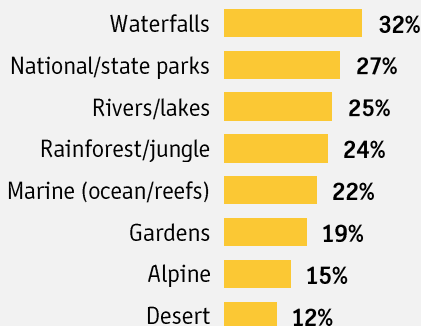
AUSTRALIA INTEREST IN TOURISM SUB-EXPERIENCES

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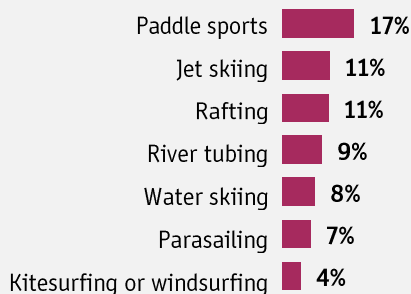


- Street food and casual or mid-range dining are Australians' preferred forms of dining out
- Australians show a strong preference for large-vessel cruising over small-vessel cruising, but similar interest levels between mountain biking and road cycling, and self-drive vs. guided 4WD tours

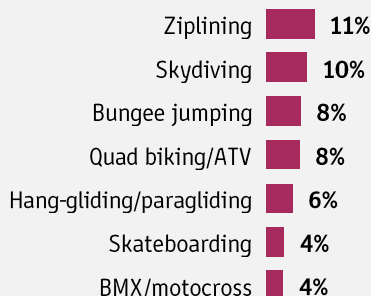
EXPLORING WILDERNESS 43%



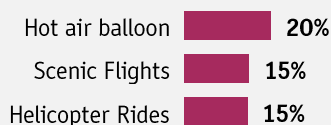
WATER SPORTS 25%



EXTREME SPORTS 19%



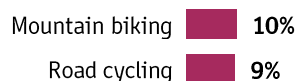
AERIAL TOURS/FLIGHTS 29%



4WD/OFF-ROADING 20%



CYCLING 16%



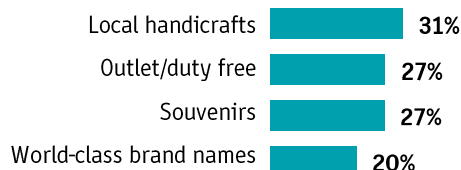
CRUISING 39%



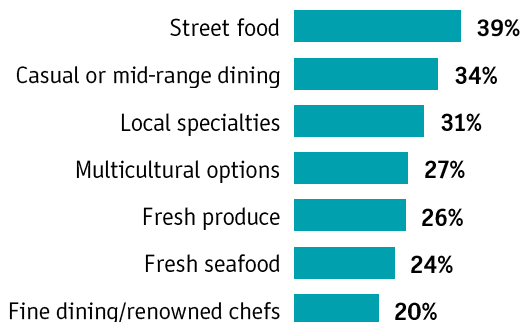
INDIGENOUS FOOD 30%



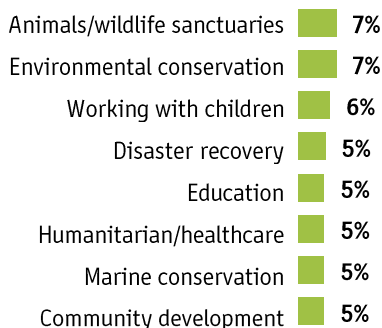
SHOPPING 57%



DINING OUT 65%

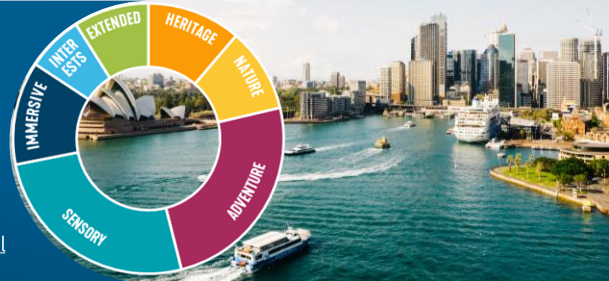


VOLUNTEERING 15%



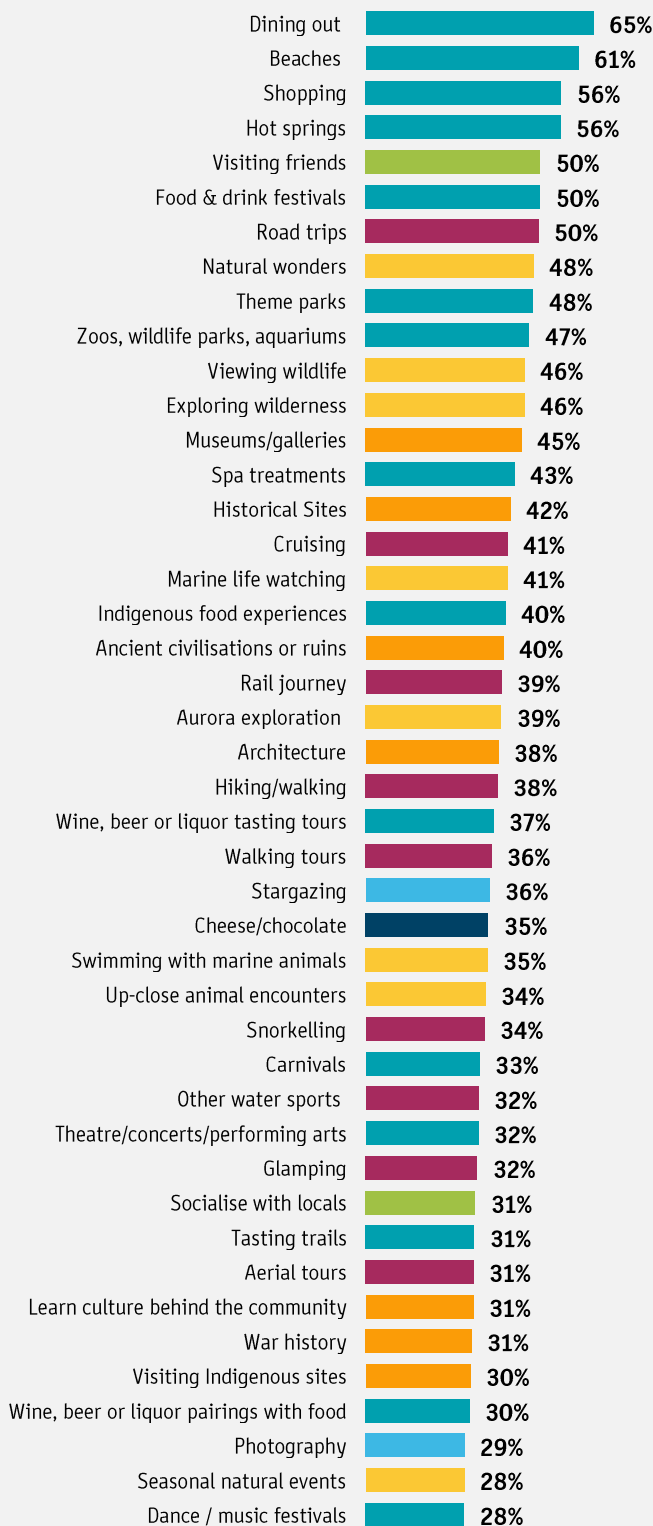
NEW ZEALAND INTEREST IN TOURISM EXPERIENCES

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



- The top experiences in the New Zealand market are sensory: dining out, beaches, shopping and hot springs
- Half of New Zealanders are interested in visiting friends and relatives for an extended period
- Road trips are also in high demand within the New Zealand market

RANKED 1-44



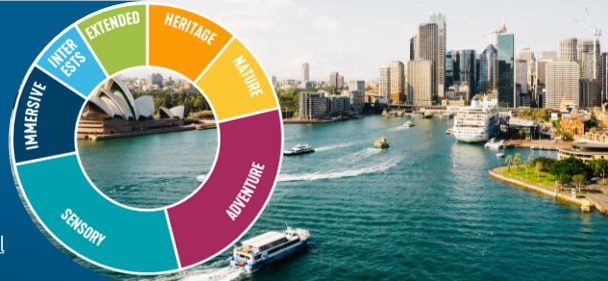
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, New Zealand (n=1,565).

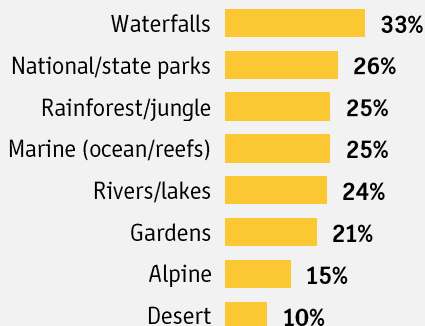
NEW ZEALAND INTEREST IN TOURISM SUB-EXPERIENCES

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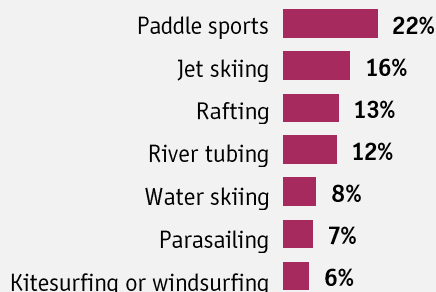


- Street food in New Zealanders' preferred form of dining out, while Indigenous dining is the leading Indigenous food experience
- Similar interest levels between mountain biking and road cycling
- Local handicrafts, outlet/duty free and souvenirs are New Zealanders' preferred forms of shopping, ahead of world class brand names

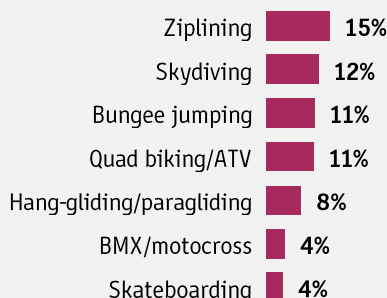
EXPLORING WILDERNESS 46%



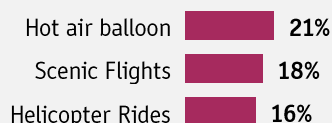
WATER SPORTS 32%



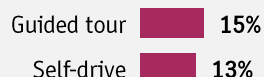
EXTREME SPORTS 23%



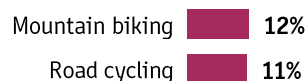
AERIAL TOURS/FLIGHTS 31%



4WD/OFF-ROADING 23%



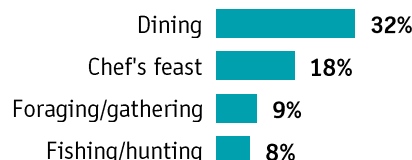
CYCLING 20%



CRUISING 41%



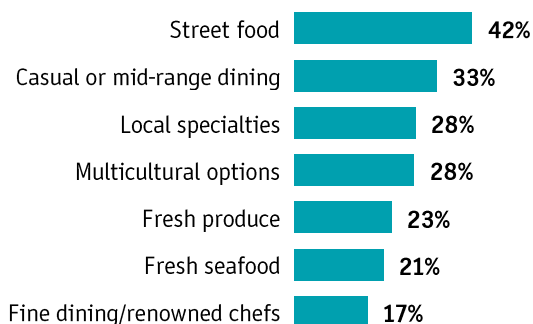
INDIGENOUS FOOD 40%



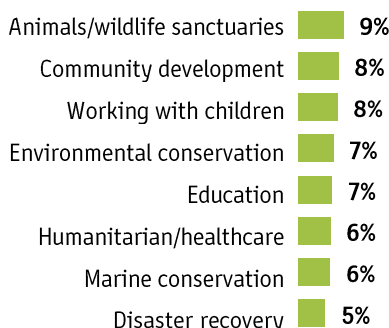
SHOPPING 56%



DINING OUT 65%

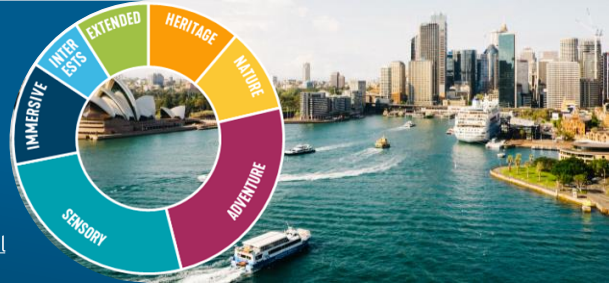


VOLUNTEERING 18%



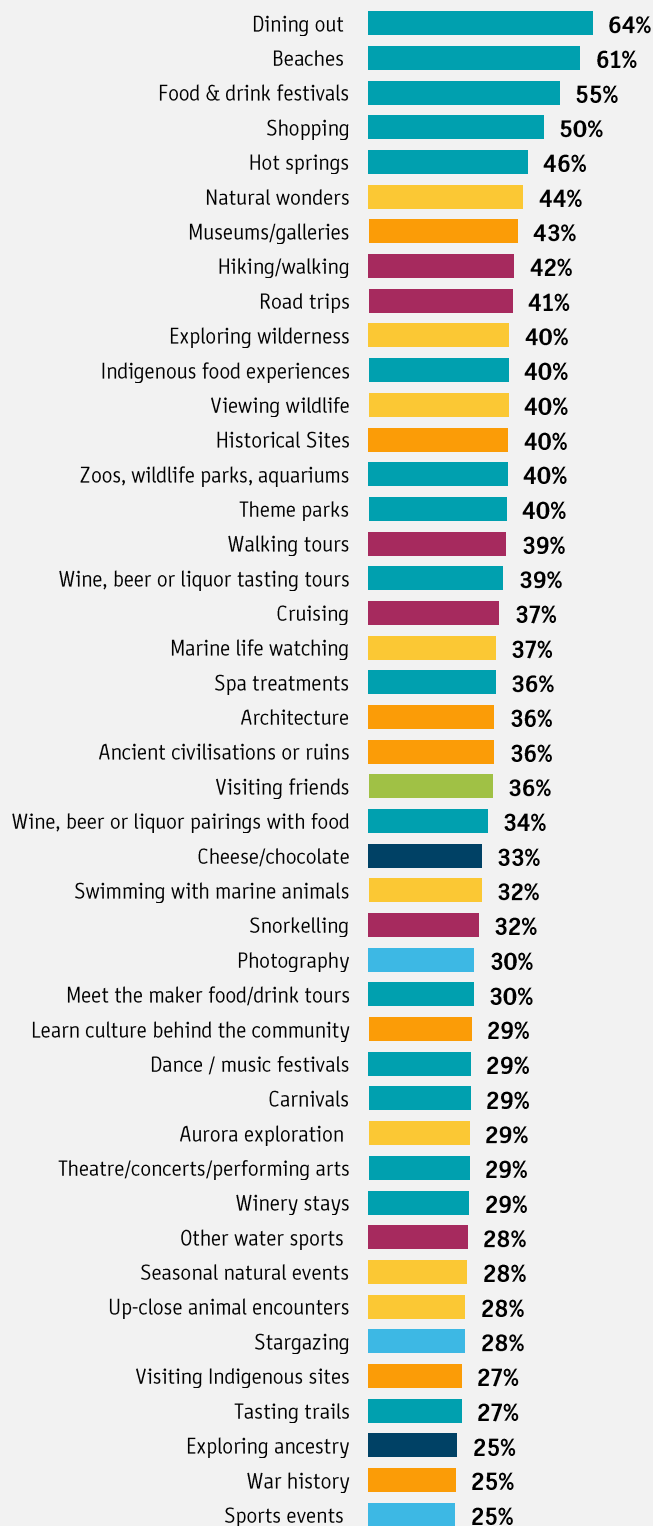
USA INTEREST IN TOURISM EXPERIENCES

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- The top 5 experiences in the US market are all sensory: dining out, beaches, food and drink festivals and shopping
- Exploration-based forms of adventure are also in demand in the US market, particularly hiking/walking and road trips

RANKED 1-44



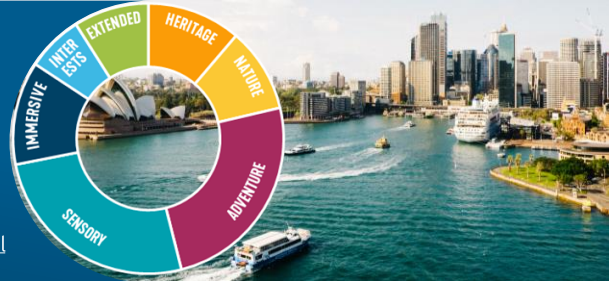
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, USA (n=1,500).

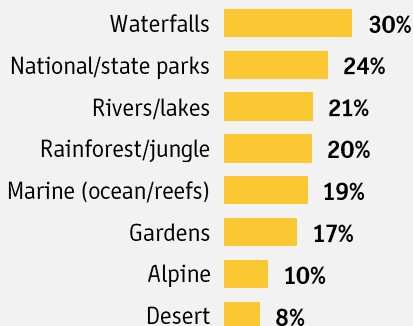
USA INTEREST IN TOURISM SUB-EXPERIENCES

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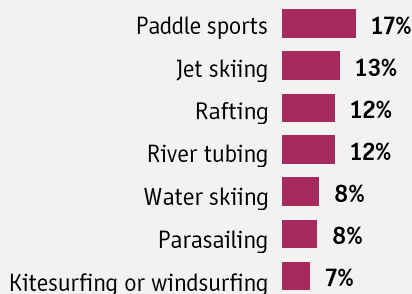


- The specific dining experiences attracting greatest US interest are street food and local specialties, pointing to the importance of *place*
- Souvenirs and local handicrafts are the most popular forms of shopping, similarly highlighting a demand for local products
- The US market shows a preference for ziplining over other forms of extreme sport

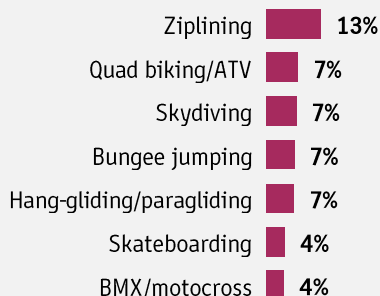
EXPLORING WILDERNESS 40%



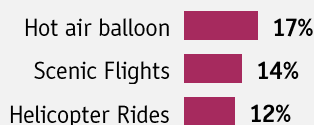
WATER SPORTS 28%



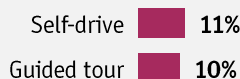
EXTREME SPORTS 21%



AERIAL TOURS/FLIGHTS 25%



4WD/OFF-ROADING 17%



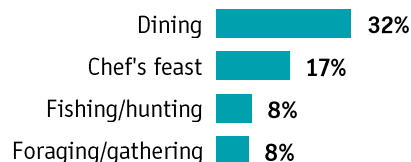
CYCLING 20%



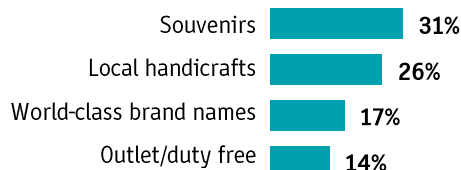
CRUISING 37%



INDIGENOUS FOOD 40%



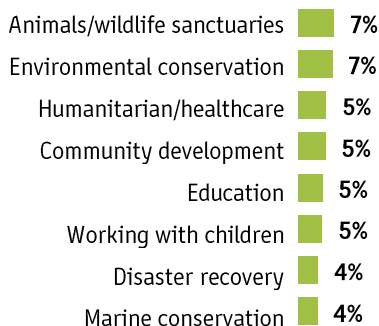
SHOPPING 50%



DINING OUT 64%

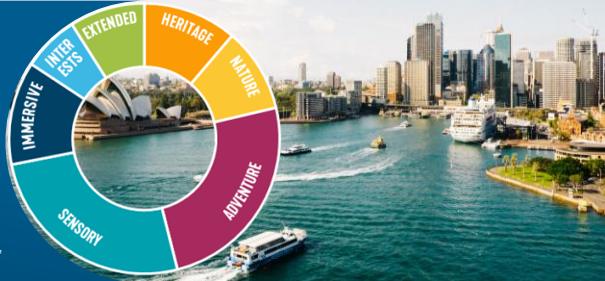


VOLUNTEERING 14%



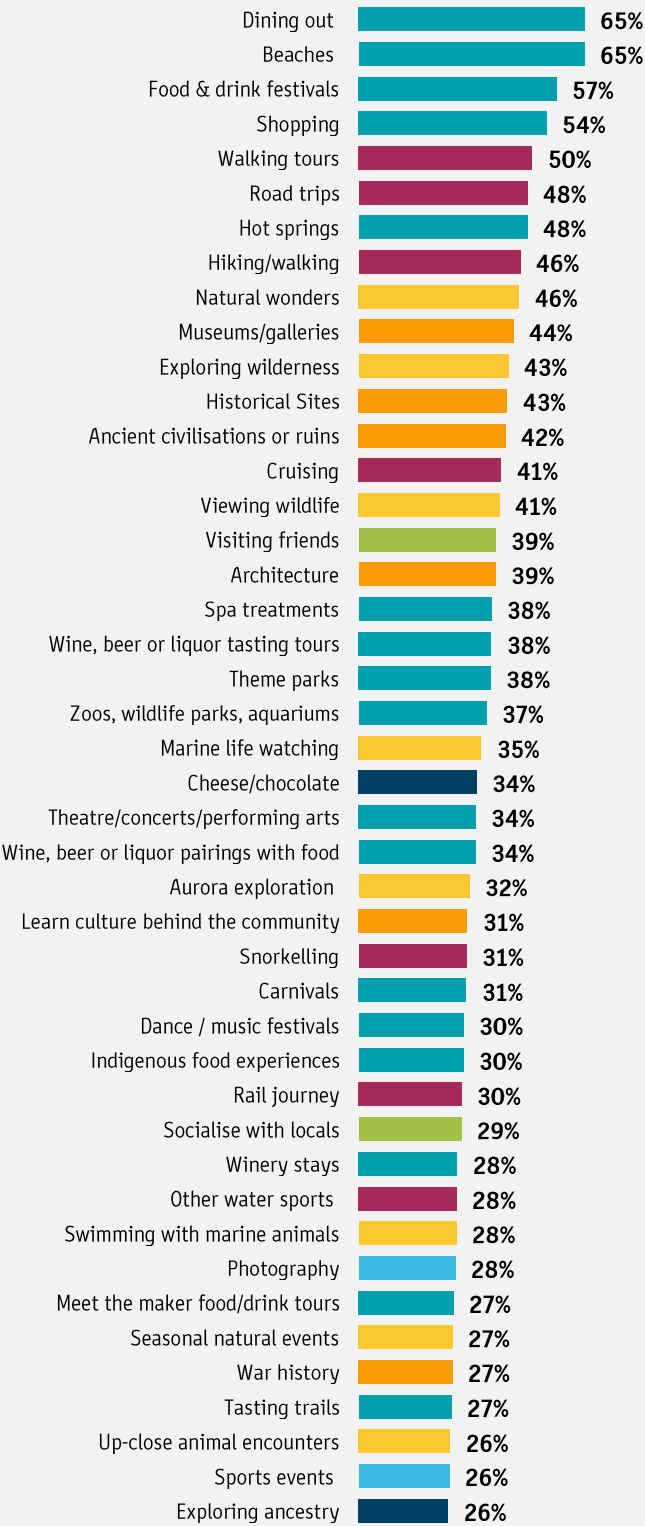
CANADA INTEREST IN TOURISM EXPERIENCES

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

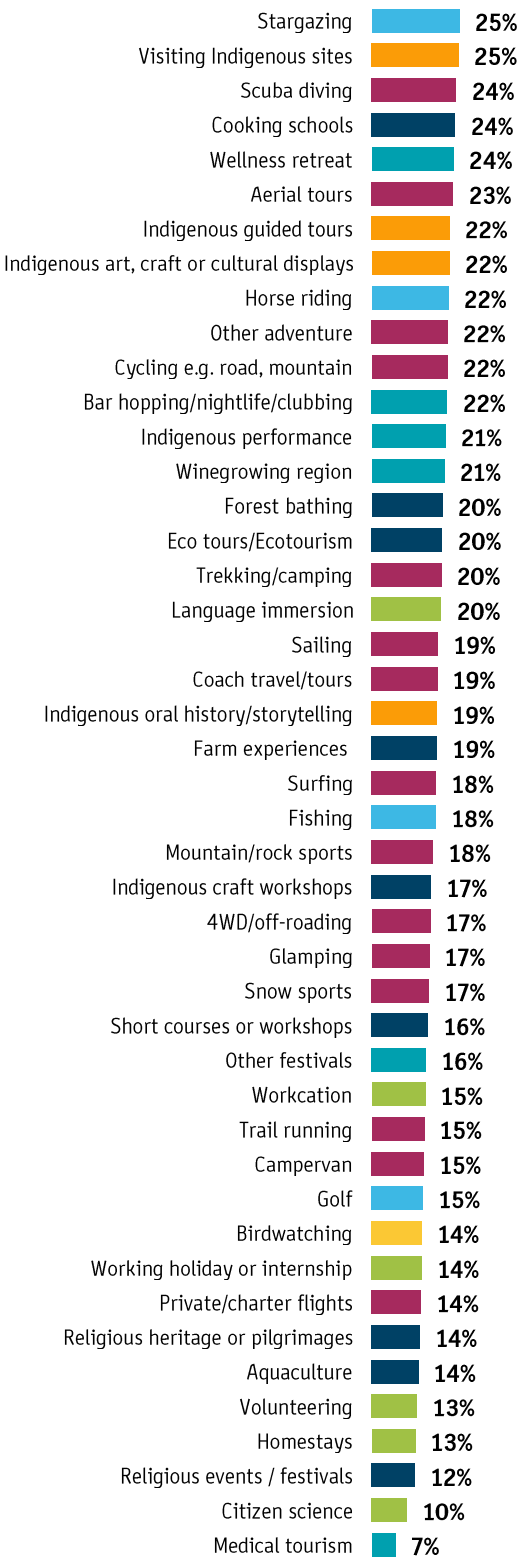


- The Canadian market has highest demand for popular sensory experiences like dining out, beaches, food and drink festivals and shopping
- Also popular in this market are exploration-based adventure experiences like walking tours, road trips and hiking/walking
- Nature- and history-based experiences are also popular among Canadian travellers

RANKED 1-44



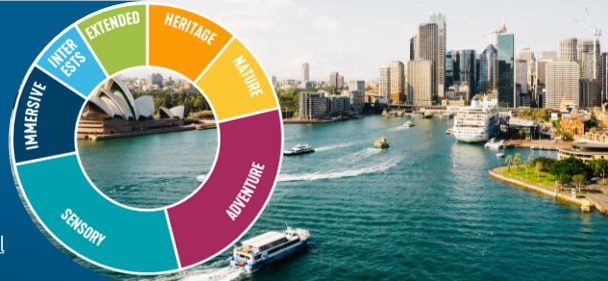
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Canada (n=1,032).

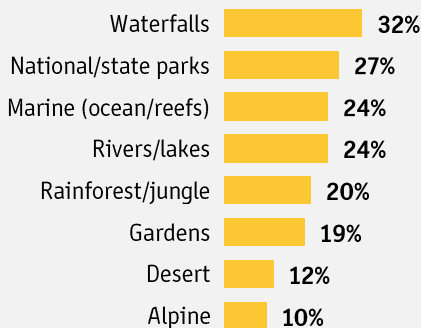
CANADA INTEREST IN TOURISM SUB-EXPERIENCES

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

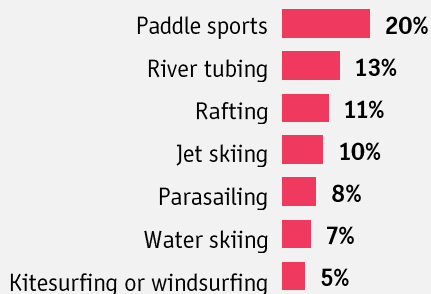


- Souvenirs and local handicrafts are the most popular forms of shopping for the Canadian market, highlighting a demand for local products
- Canadian travellers show strong interest in dining and chef's feasts as expressions of Indigenous food experiences
- Slight preference for road cycling over mountain biking

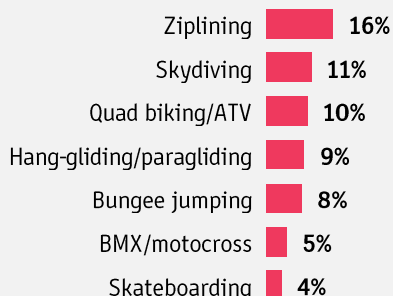
EXPLORING WILDERNESS 43%



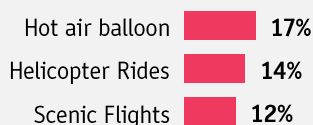
WATER SPORTS 28%



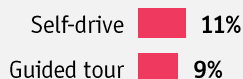
EXTREME SPORTS 22%



AERIAL TOURS/FLIGHTS 23%



4WD/OFF-ROADING 17%



CYCLING 22%



CRUISING 41%



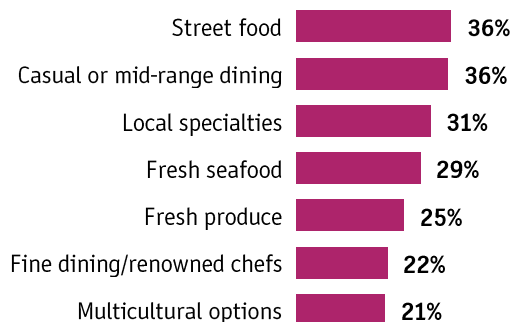
INDIGENOUS FOOD 30%



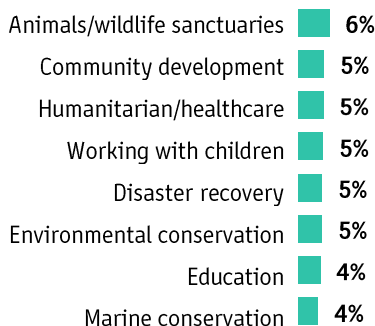
SHOPPING 54%



DINING OUT 65%

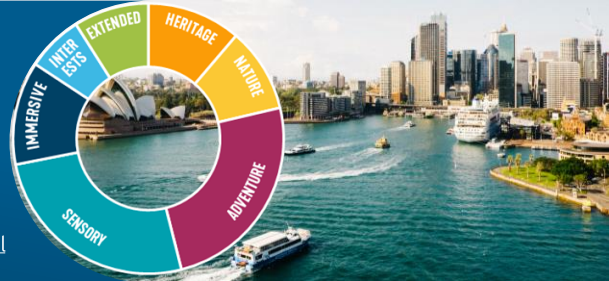


VOLUNTEERING 13%



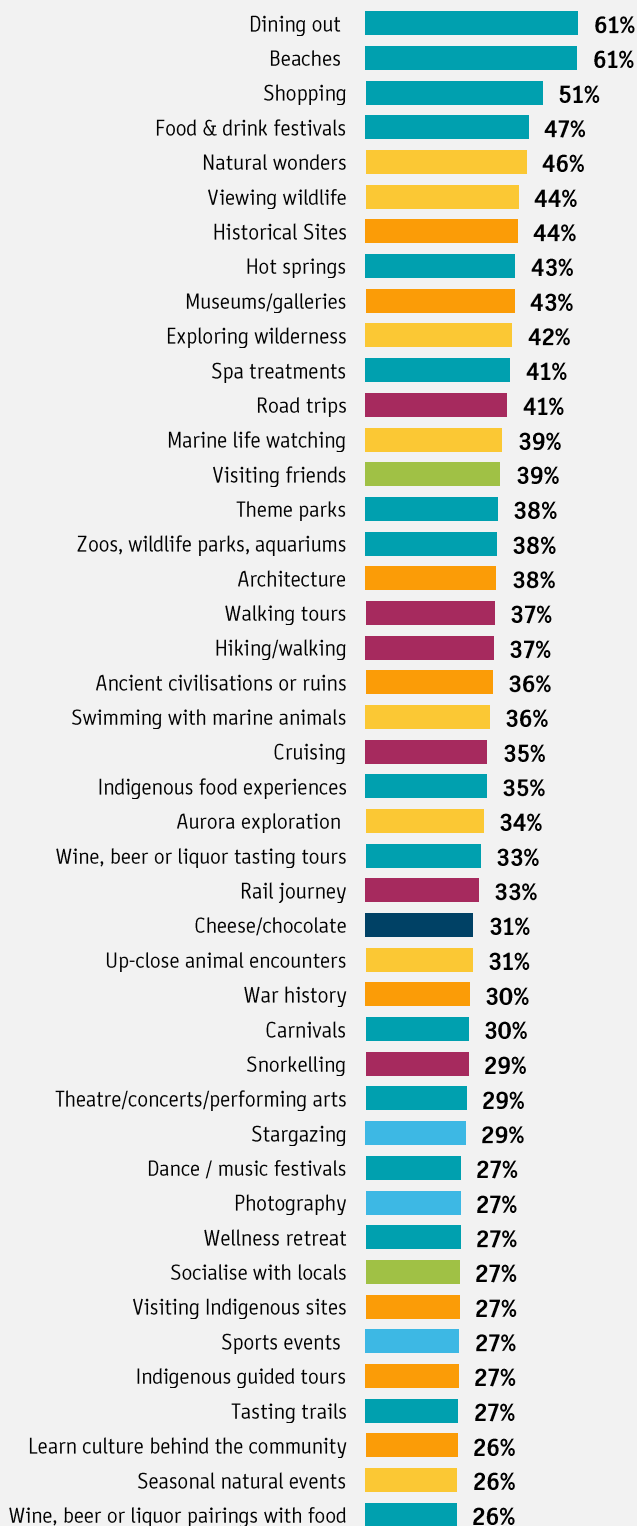
UNITED KINGDOM INTEREST IN TOURISM EXPERIENCES

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

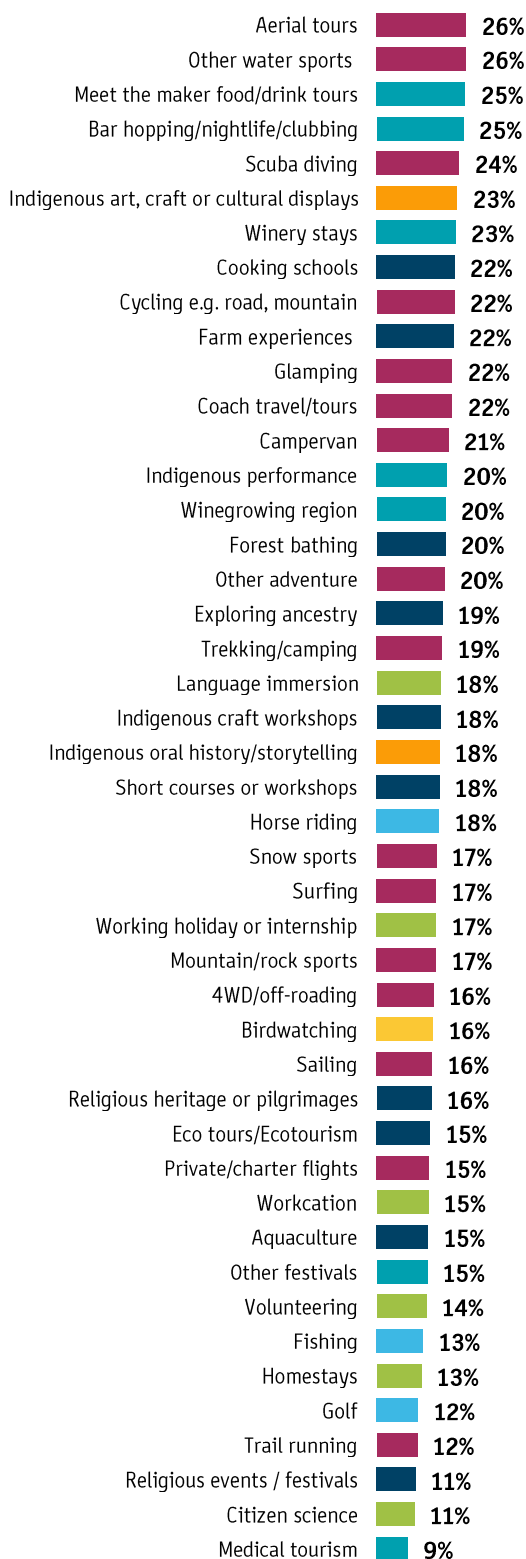


- Sensory, nature and heritage experiences dominate in appeal among UK travellers
- Viewing wildlife in their natural environment ranks highly in interest within the UK market, while watching and swimming with marine animals are also relatively popular in this market

RANKED 1-44



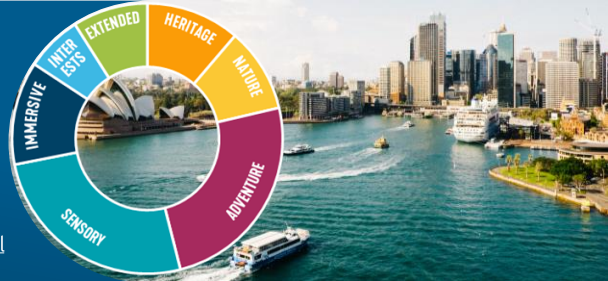
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, United Kingdom (n=1,643).

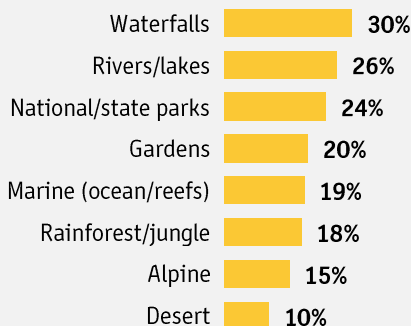
UNITED KINGDOM INTEREST IN TOURISM SUB-EXPERIENCES

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

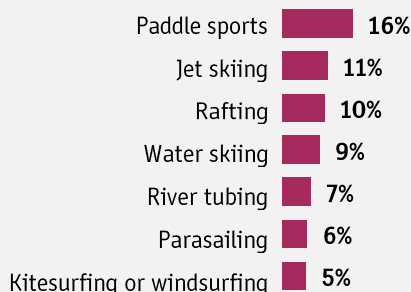


- Souvenirs are the preferred form of shopping within the UK market
- UK travellers show strong interest in Indigenous dining, followed by chef's feasts with native ingredients, as leading expressions of Indigenous food experiences

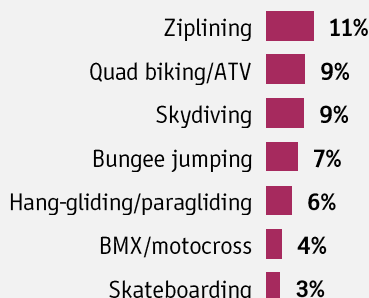
EXPLORING WILDERNESS 42%



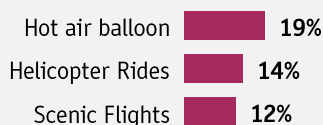
WATER SPORTS 26%



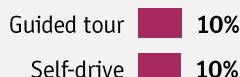
EXTREME SPORTS 20%



AERIAL TOURS/FLIGHTS 26%



4WD/OFF-ROADING 16%



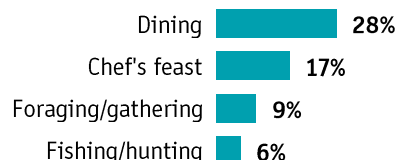
CYCLING 22%



CRUISING 35%



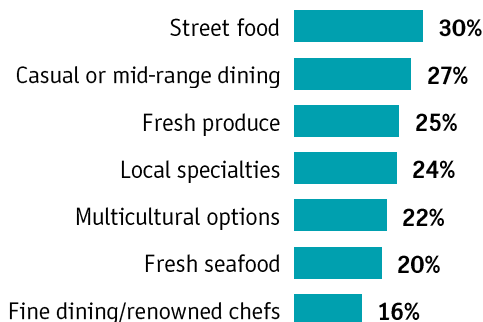
INDIGENOUS FOOD 35%



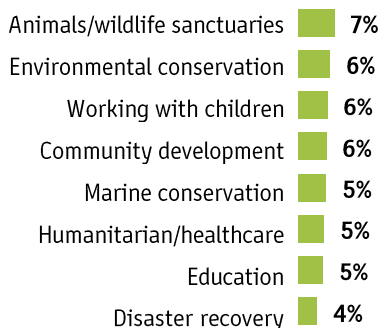
SHOPPING 51%



DINING OUT 61%

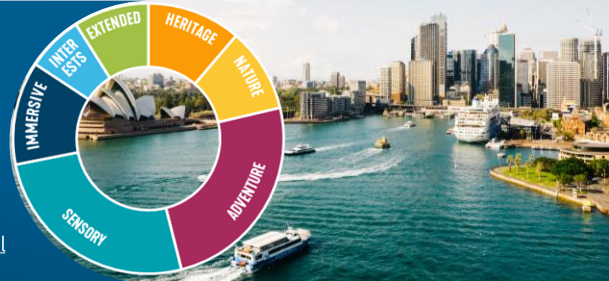


VOLUNTEERING 14%



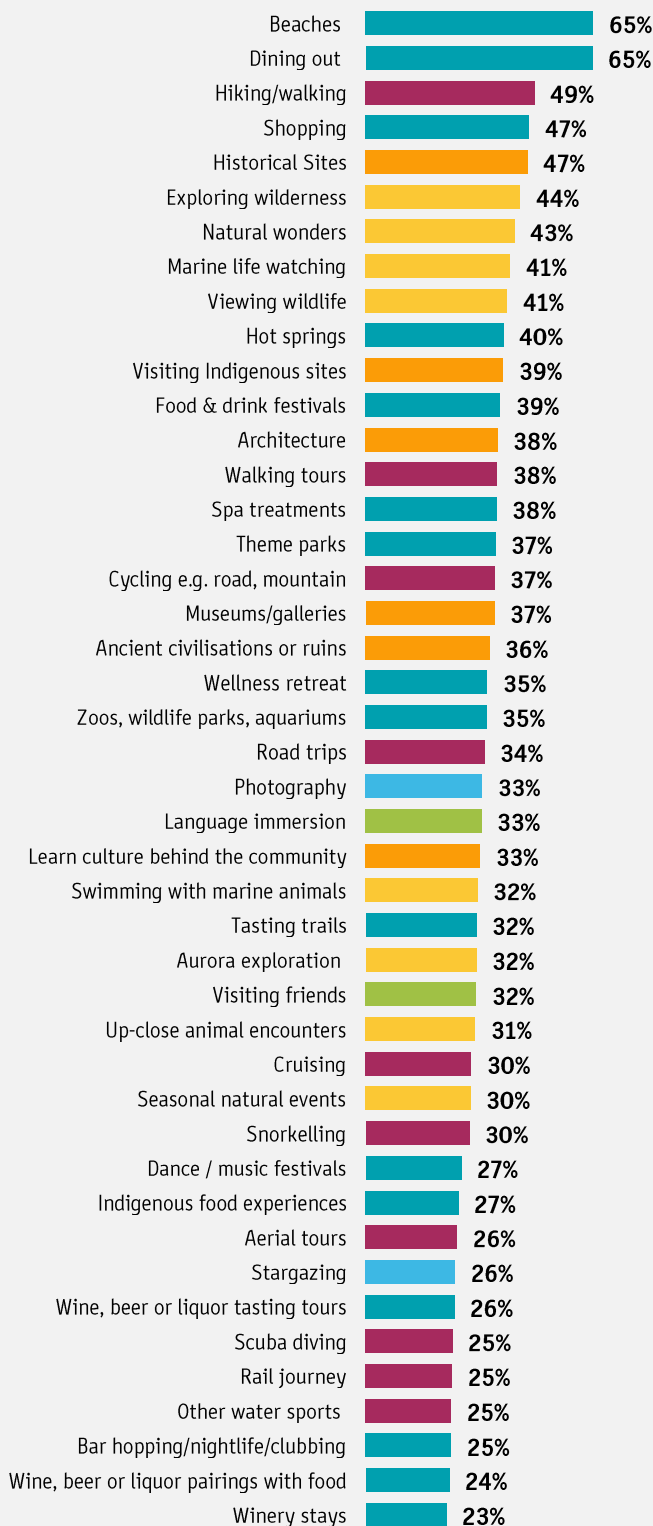
GERMANY INTEREST IN TOURISM EXPERIENCES

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

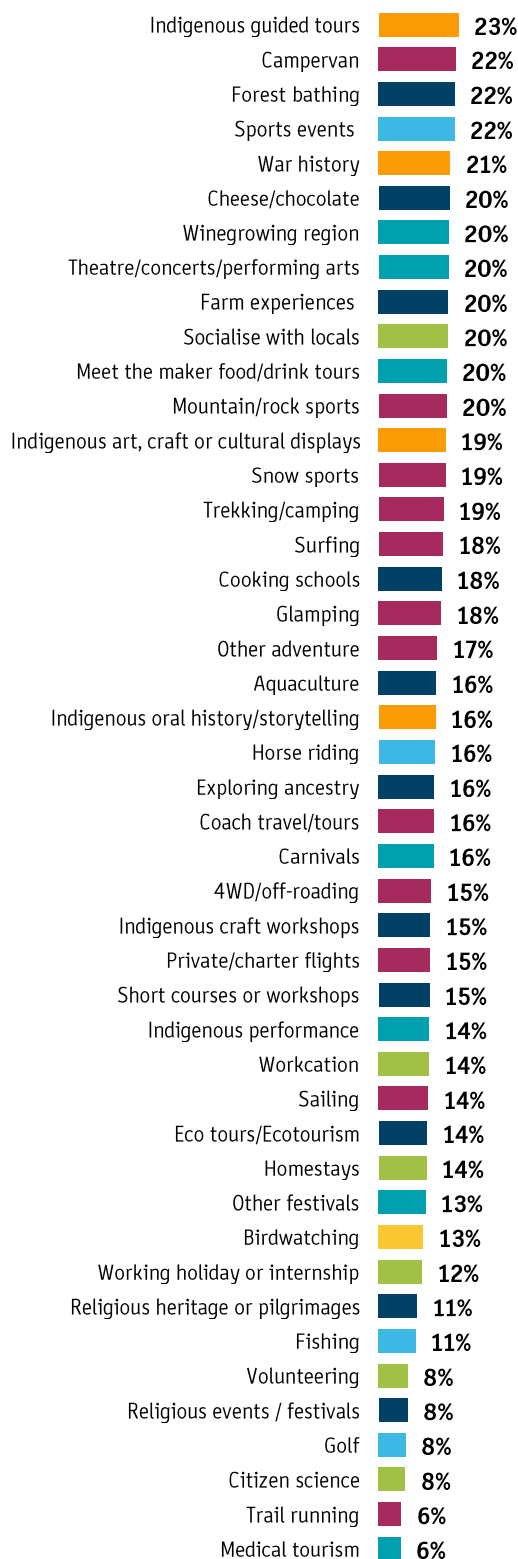


- Beaches and dining out are the leading experiences within the German market, by a strong margin
- Hiking and walking rounds out the top 3, with almost half of German Out of Region travellers interested
- The German market shows strong interest in nature-based experiences (including wildlife experiences)

RANKED 1-44



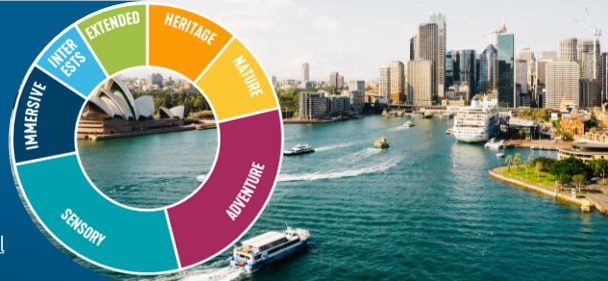
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Germany (n=1,134).

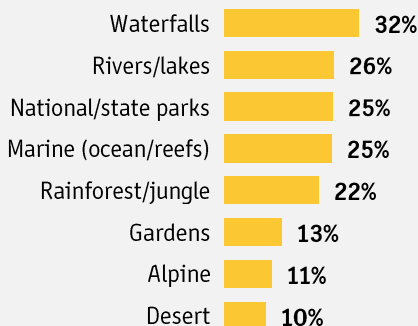
GERMANY INTEREST IN TOURISM SUB-EXPERIENCES

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

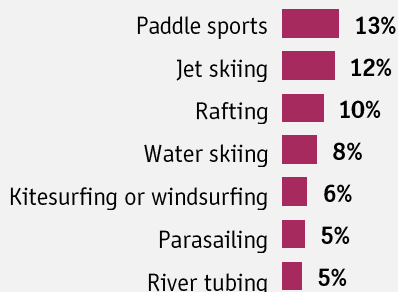


- Germans show a strong preference for road cycling over mountain biking
- Local specialties are the leading expression of dining out within the German market, followed by street food and casual/mid-range dining
- Dining and chef's feasts are the leading expressions of Indigenous food experiences among German Out of Region Travellers

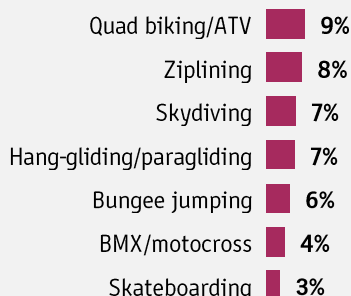
EXPLORING WILDERNESS 44%



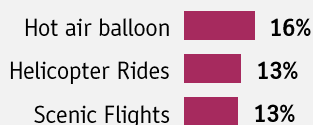
WATER SPORTS 25%



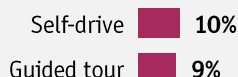
EXTREME SPORTS 17%



AERIAL TOURS/FLIGHTS 26%



4WD/OFF-ROADING 15%



CYCLING 37%



CRUISING 30%



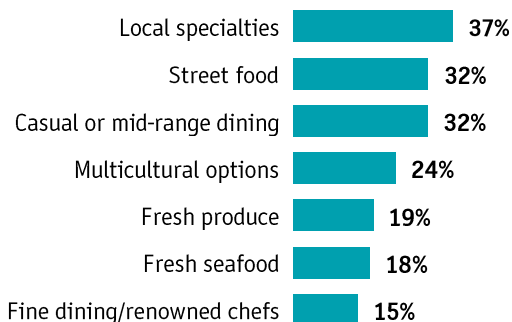
INDIGENOUS FOOD 27%



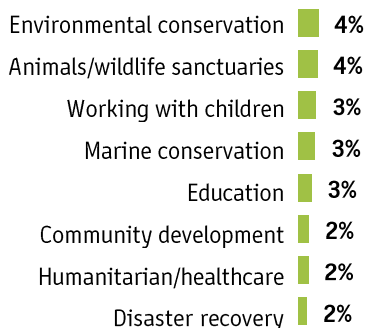
SHOPPING 47%



DINING OUT 65%

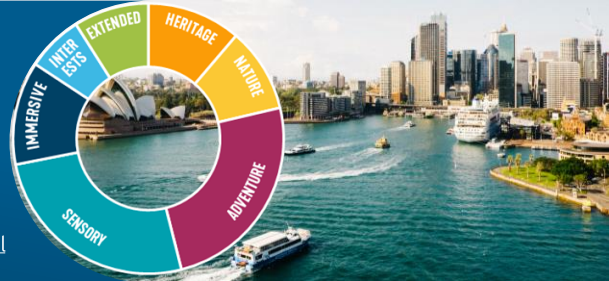


VOLUNTEERING 8%



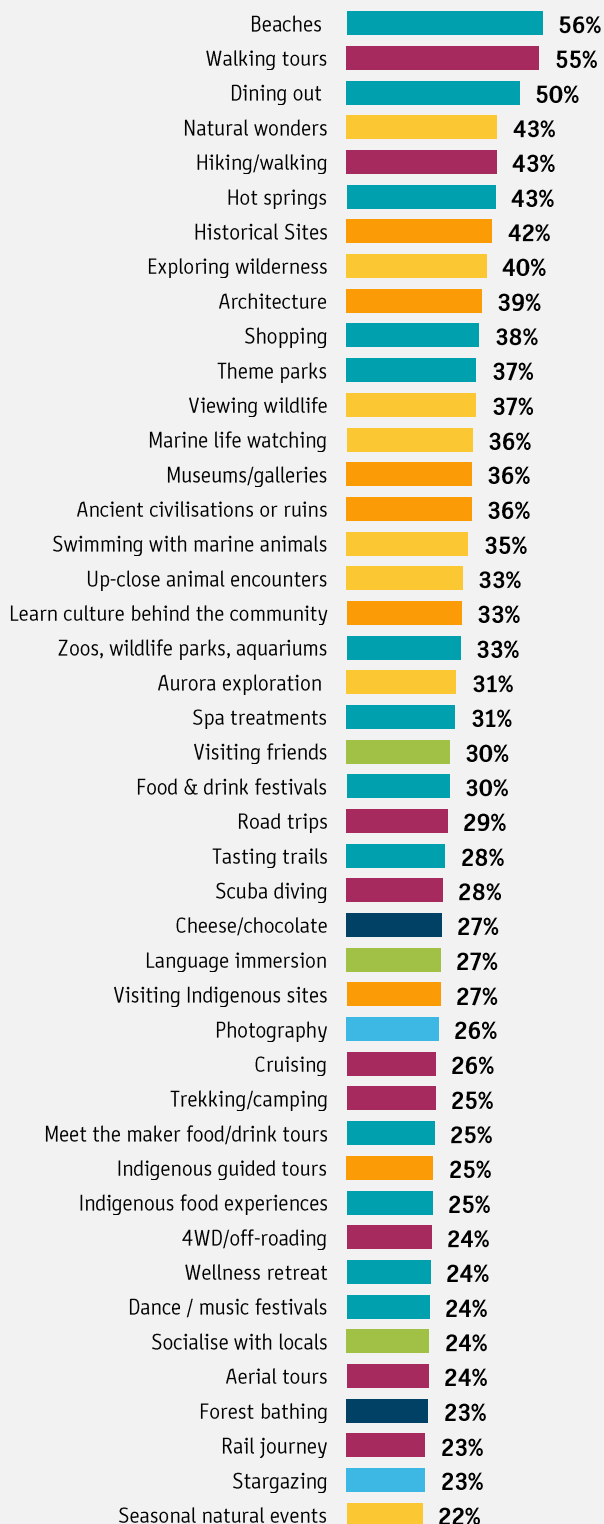
FRANCE INTEREST IN TOURISM EXPERIENCES

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

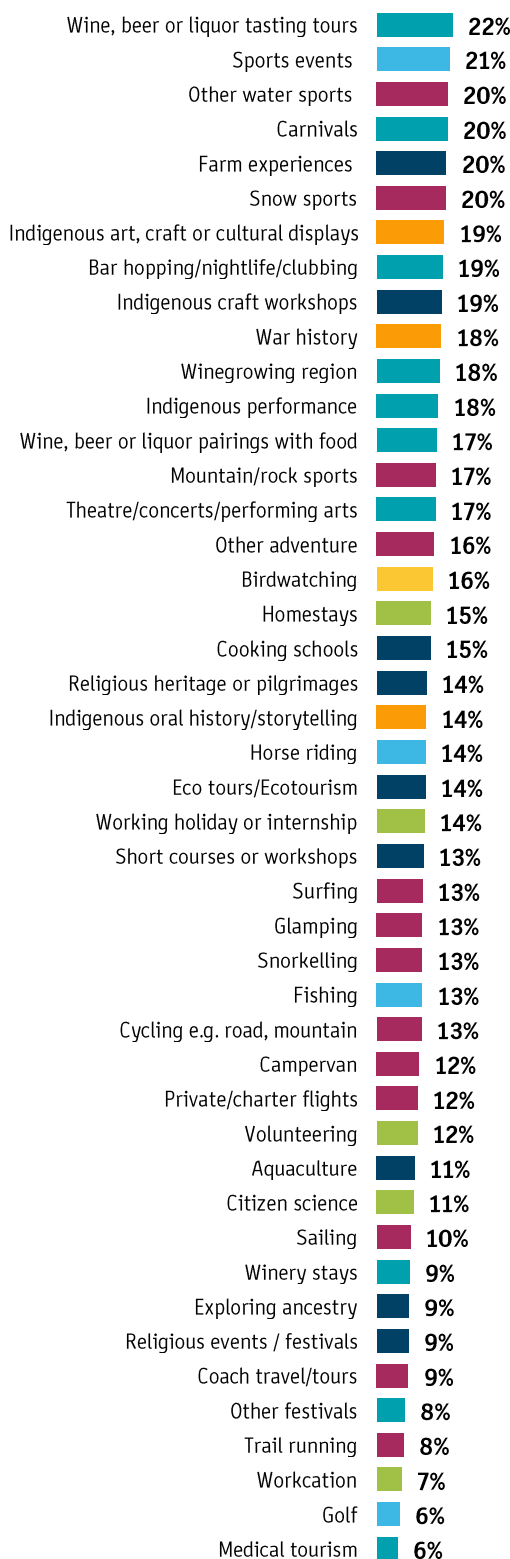


- Walking tours hold particularly high appeal in France, second only to beaches in this market
- In addition to sensory experiences, the French market also has strong demand for nature (natural environment and wildlife) and heritage (history) experiences

RANKED 1-44



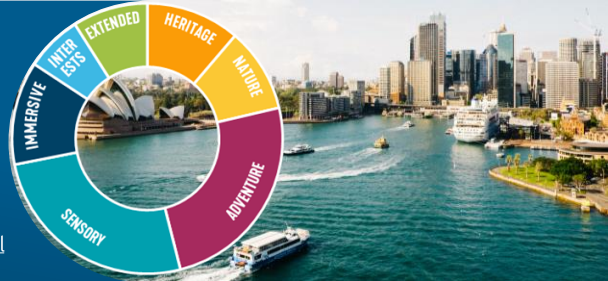
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, France (n=1,159).

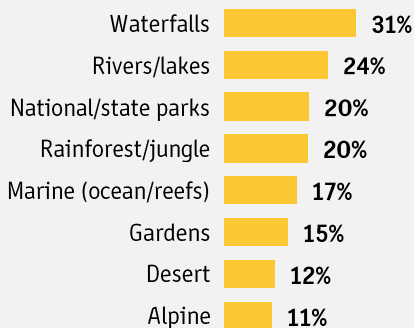
FRANCE INTEREST IN TOURISM SUB-EXPERIENCES

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

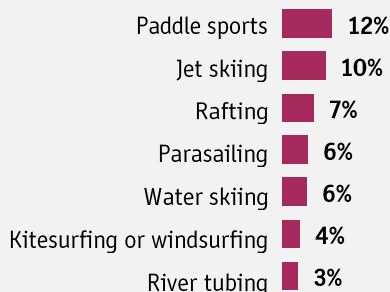


- The French market has a preference for souvenirs, followed by local handicrafts, as the most popular shopping experiences
- Local specialties are the leading expression of dining out for the French market, followed by local specialties and casual/mid-range dining
- Indigenous dining is the most prominent form of Indigenous food for this market

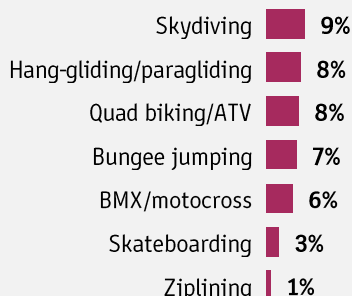
EXPLORING WILDERNESS 40%



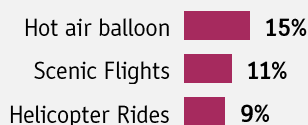
WATER SPORTS 20%



EXTREME SPORTS 16%



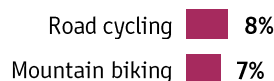
AERIAL TOURS/FLIGHTS 24%



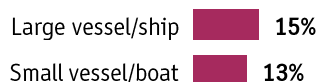
4WD/OFF-ROADING 24%



CYCLING 13%



CRUISING 26%



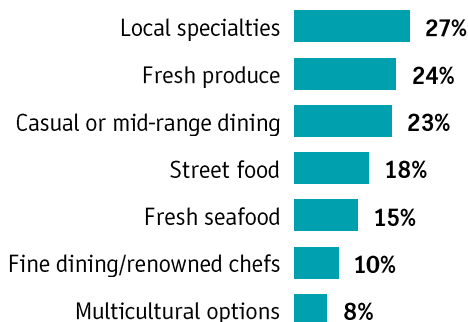
INDIGENOUS FOOD 25%



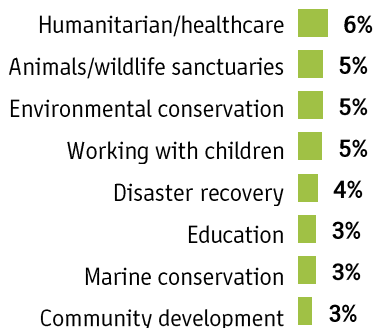
SHOPPING 38%



DINING OUT 50%

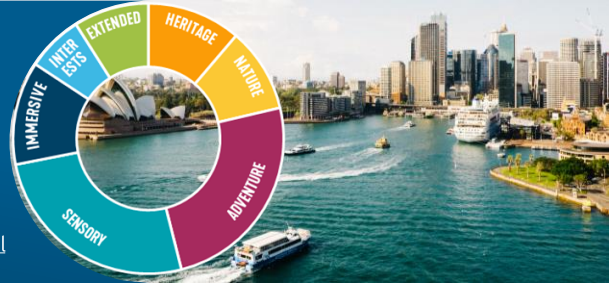


VOLUNTEERING 12%



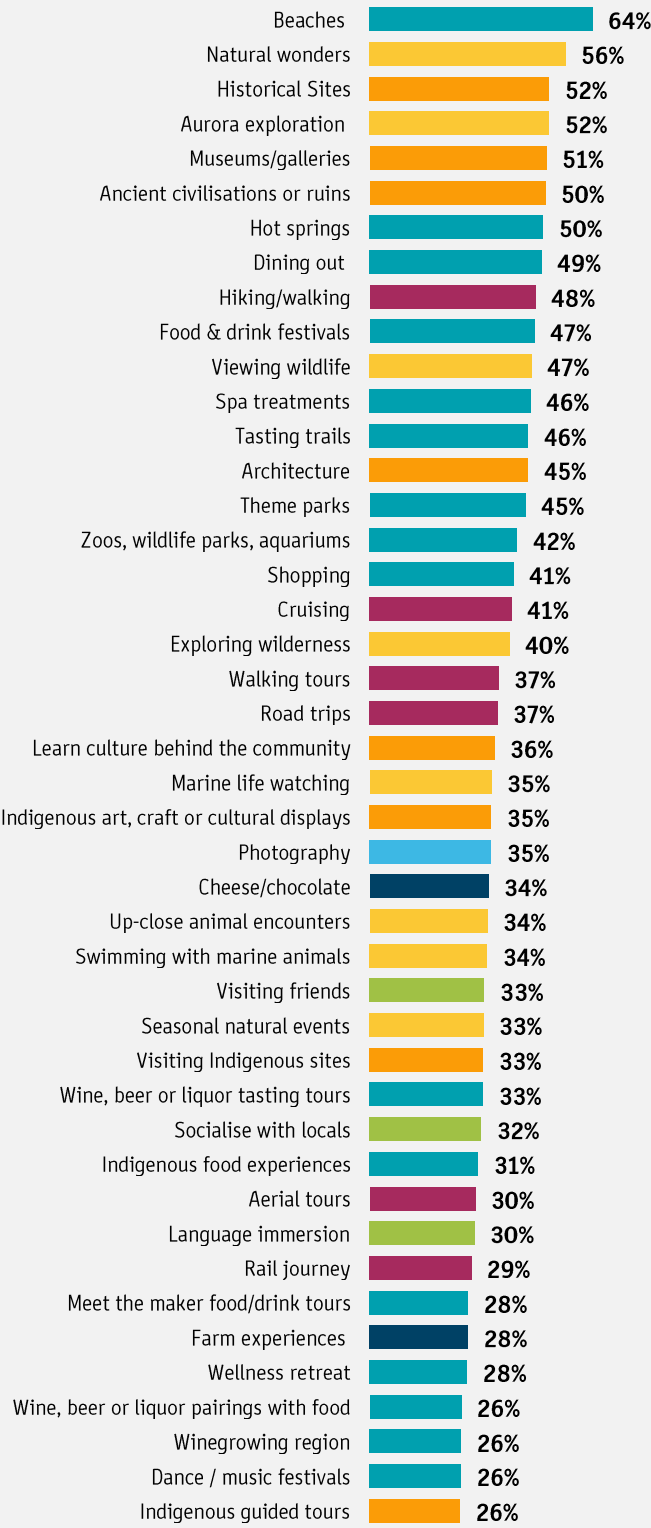
ITALY INTEREST IN TOURISM EXPERIENCES

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

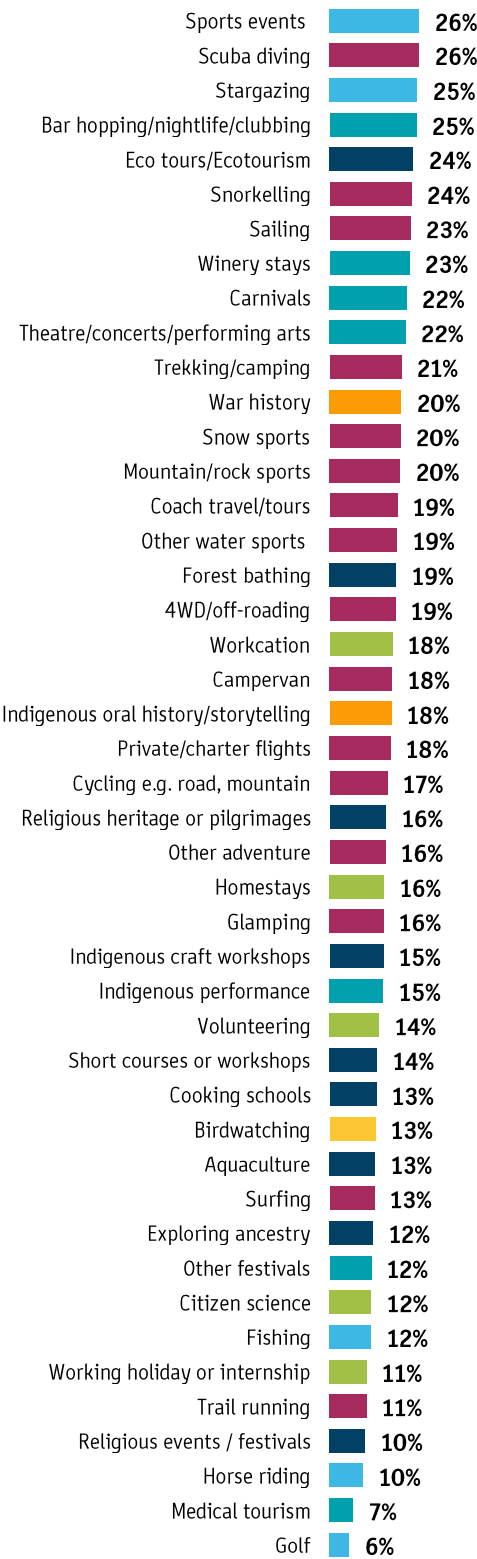


- While beaches are the leading experience in the Italian market, this audience shows much more prominent demand for nature and heritage experiences compared to other global markets
- Aurora exploration ranks particularly highly in interest among the Italian travelling population

RANKED 1-44



RANKED 45-89

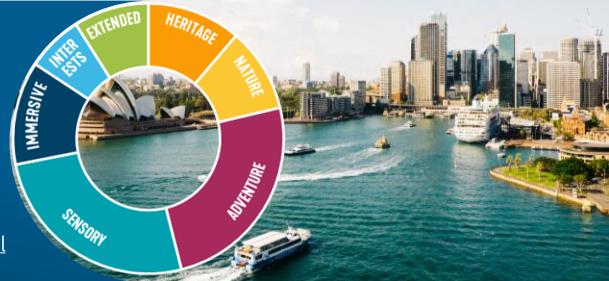


Question: Which of these experiences would you be interested in doing on a future international vacation?

Base: Future Of Demand research 2022, Total out of region travellers, Italy (n=1,161).

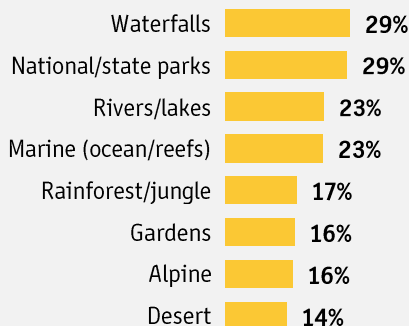
ITALY INTEREST IN TOURISM SUB-EXPERIENCES

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

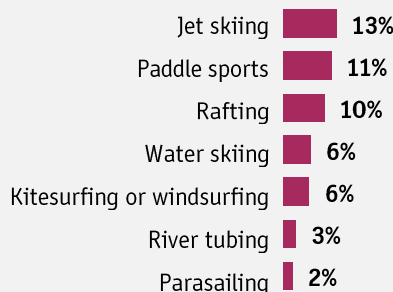


- The Italian market shows equal interest in waterfalls and national or state parks as leading nature/wilderness exploration experiences
- Strong preference for large-vessel cruising over smaller vessels within the Italian market
- Clear preference for Indigenous dining as the leading form of Indigenous food experiences

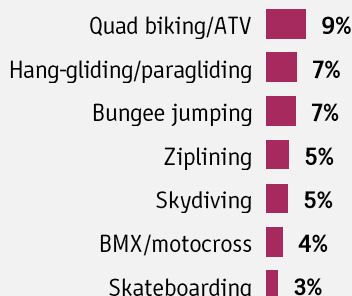
EXPLORING WILDERNESS 40%



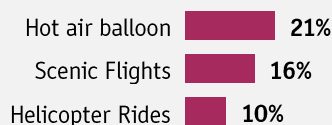
WATER SPORTS 19%



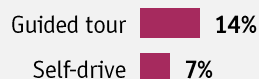
EXTREME SPORTS 16%



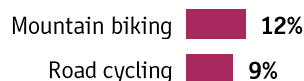
AERIAL TOURS/FLIGHTS 30%



4WD/OFF-ROADING 19%



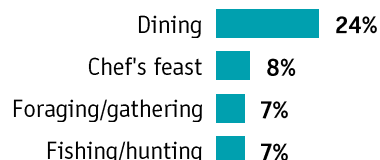
CYCLING 17%



CRUISING 41%



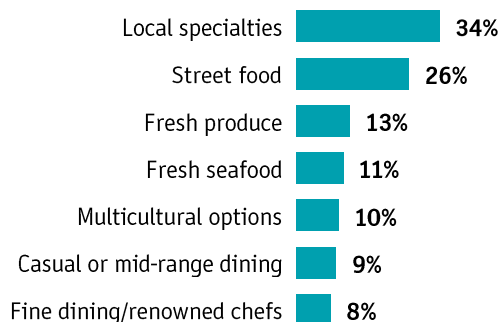
INDIGENOUS FOOD 31%



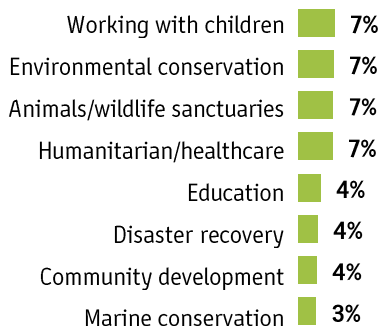
SHOPPING 41%



DINING OUT 49%

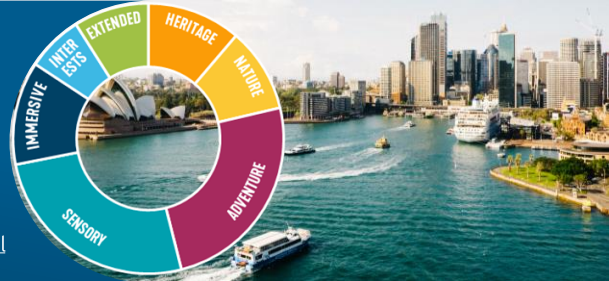


VOLUNTEERING 14%



CHINA INTEREST IN TOURISM EXPERIENCES

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



- 8 of the top 10 experiences among the Chinese market sit within the sensory cluster, with popular experiences, hot springs, and food and drink experiences of particularly strong appeal
- Farm experiences also rank highly among the Chinese audience

RANKED 1-44

Beaches	48%
Hot springs	45%
Food & drink festivals	45%
Theme parks	43%
Tasting trails	42%
Dining out	42%
Shopping	40%
Wine, beer or liquor pairings with food	39%
Farm experiences	38%
Historical Sites	36%
Architecture	36%
Natural wonders	36%
Indigenous food experiences	35%
Exploring wilderness	35%
Zoos, wildlife parks, aquariums	34%
Ancient civilisations or ruins	33%
Viewing wildlife	33%
Cruising	32%
Aerial tours	32%
Eco tours/Ecotourism	30%
Walking tours	30%
Wine, beer or liquor tasting tours	29%
Stargazing	29%
Photography	29%
Forest bathing	27%
Indigenous art, craft or cultural displays	26%
Cycling e.g. road, mountain	26%
Carnivals	26%
Surfing	26%
Sports events	26%
Marine life watching	26%
Language immersion	25%
Aurora exploration	25%
Visiting Indigenous sites	25%
Indigenous performance	25%
Spa treatments	25%
Museums/galleries	25%
Other water sports	24%
Winegrowing region	24%
Meet the maker food/drink tours	24%
Snow sports	24%
Wellness retreat	24%
Dance / music festivals	23%
Up-close animal encounters	23%

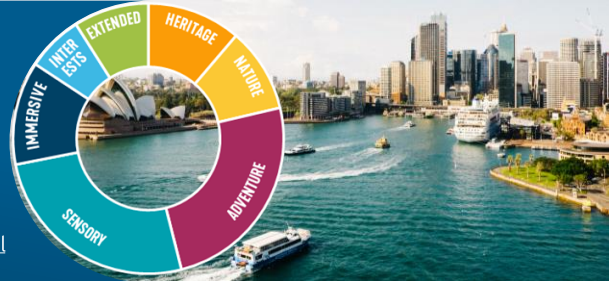
RANKED 45-89

Other adventure	22%
Seasonal natural events	22%
Cheese/chocolate	22%
Theatre/concerts/performing arts	22%
Mountain/rock sports	22%
Workcation	21%
Learn culture behind the community	21%
Horse riding	21%
Swimming with marine animals	20%
Socialise with locals	20%
Indigenous oral history/storytelling	19%
Aquaculture	19%
Indigenous craft workshops	19%
Campervan	19%
Hiking/walking	18%
Rail journey	18%
Trekking/camping	18%
Religious heritage or pilgrimages	18%
Coach travel/tours	17%
Road trips	17%
Snorkelling	17%
War history	17%
4WD/off-roading	17%
Bar hopping/nightlife/clubbing	17%
Glamping	16%
Working holiday or internship	16%
Indigenous guided tours	16%
Sailing	15%
Medical tourism	15%
Fishing	15%
Birdwatching	15%
Other festivals	14%
Citizen science	14%
Short courses or workshops	14%
Golf	14%
Visiting friends	14%
Religious events / festivals	13%
Cooking schools	13%
Winery stays	13%
Volunteering	13%
Scuba diving	13%
Homestays	13%
Exploring ancestry	12%
Trail running	11%
Private/charter flights	10%

Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, China (n=1,555).

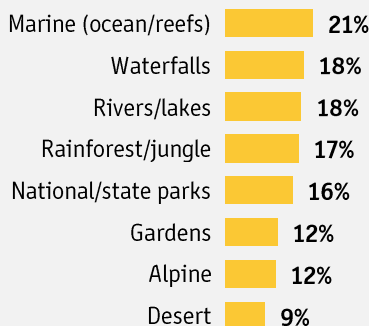
CHINA INTEREST IN TOURISM SUB-EXPERIENCES

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

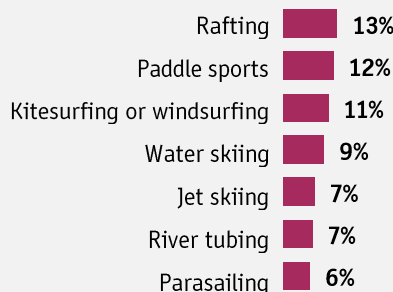


- The Chinese market has a slight preference for marine environments (oceans and reefs) as the leading form of wilderness exploration
- Hot air balloon and scenic flights attract similar level of appeal to Chinese travellers
- Within the Chinese market, several Indigenous food experiences appeal: Indigenous dining, foraging/gathering, and chef's feasts

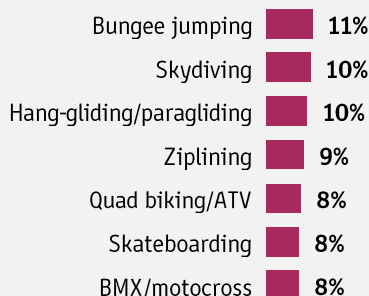
EXPLORING WILDERNESS 35%



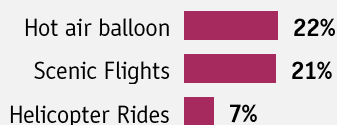
WATER SPORTS 24%



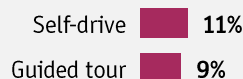
EXTREME SPORTS 22%



AERIAL TOURS/FLIGHTS 32%



4WD/OFF-ROADING 17%



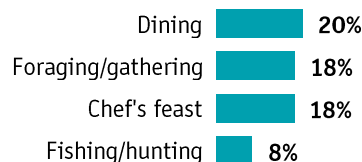
CYCLING 26%



CRUISING 32%



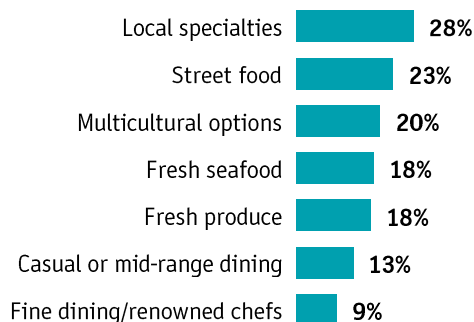
INDIGENOUS FOOD 35%



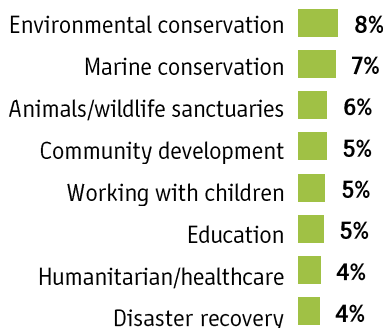
SHOPPING 40%



DINING OUT 42%

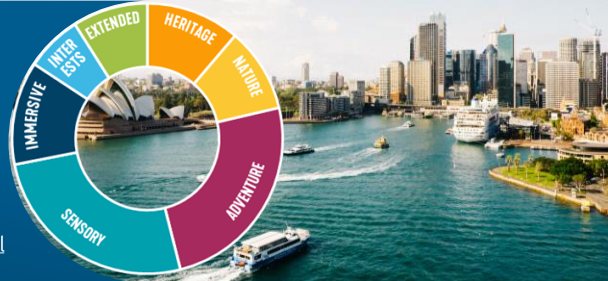


VOLUNTEERING 13%



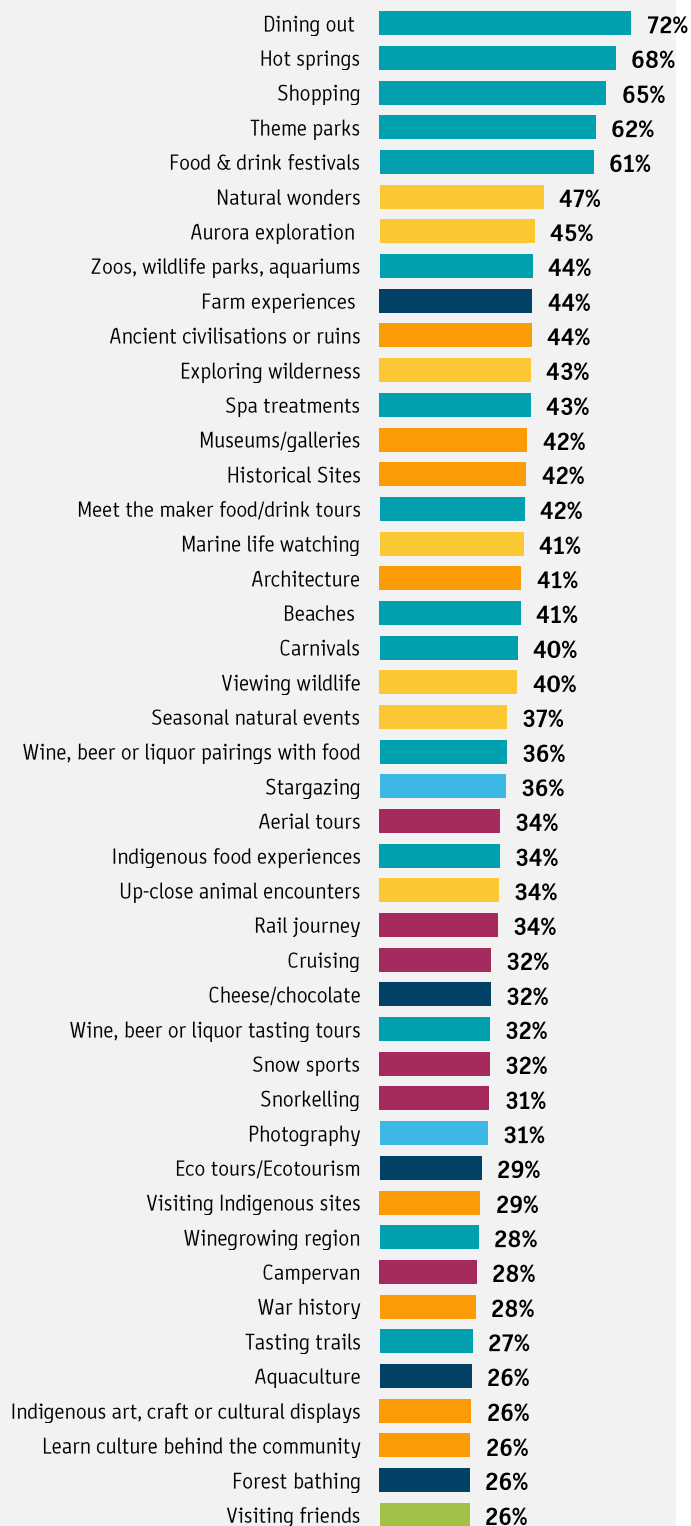
HONG KONG (SAR) INTEREST IN TOURISM EXPERIENCES

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

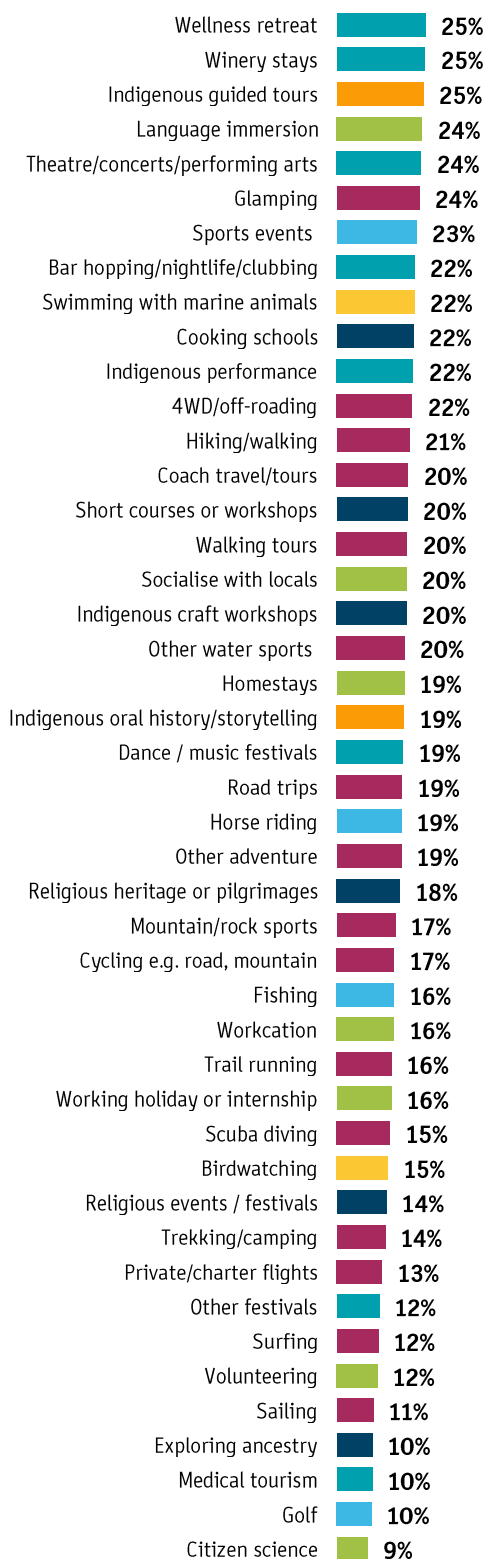


- The top 5 experiences for the Hong Kong market are all sensory
- Natural wonders and aurora exploration are also appealing to this market
- Farm experiences also rank highly in interest levels among travellers from Hong Kong

RANKED 1-44



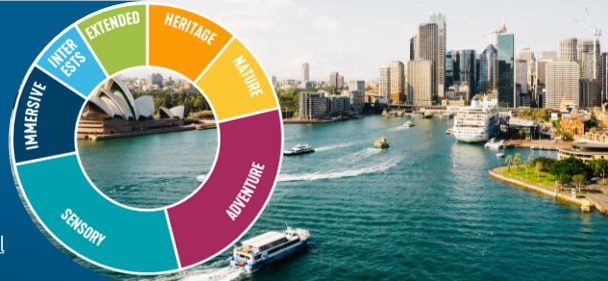
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Hong Kong (n=1,017).

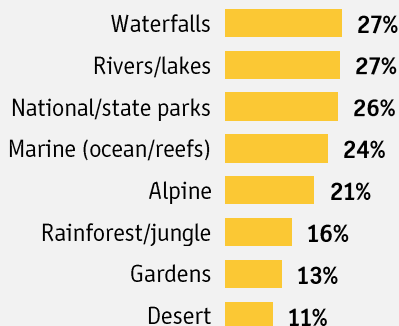
HONG KONG (SAR) INTEREST IN TOURISM SUB-EXPERIENCES

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

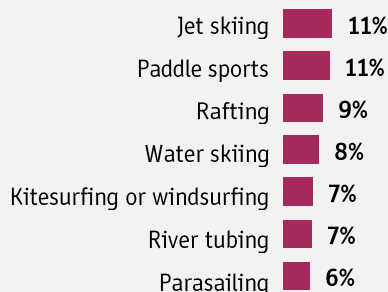


- Half of the Hong Kong market are interested in street food and local specialties dining experiences, pointing to the importance of *place*
- Souvenirs and local handicrafts are the most popular forms of shopping, similarly highlighting a demand for local products
- Exploring waterfalls, rivers/lakes, national/state parks and marine areas all appeal to around a quarter of the market

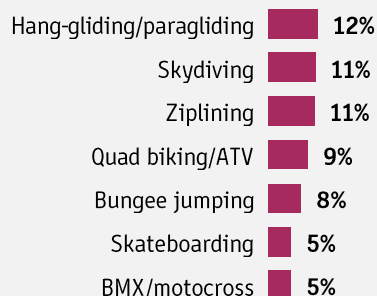
EXPLORING WILDERNESS 43%



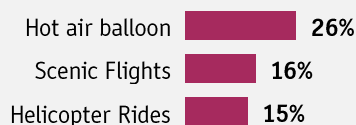
WATER SPORTS 20%



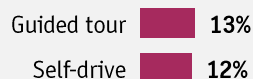
EXTREME SPORTS 19%



AERIAL TOURS/FLIGHTS 34%



4WD/OFF-ROADING 22%



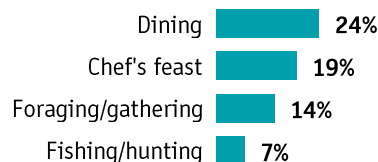
CYCLING 17%



CRUISING 32%



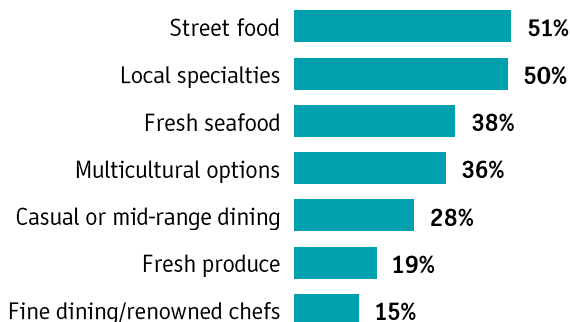
INDIGENOUS FOOD 34%



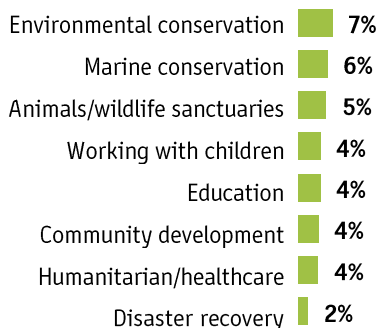
SHOPPING 65%



DINING OUT 72%

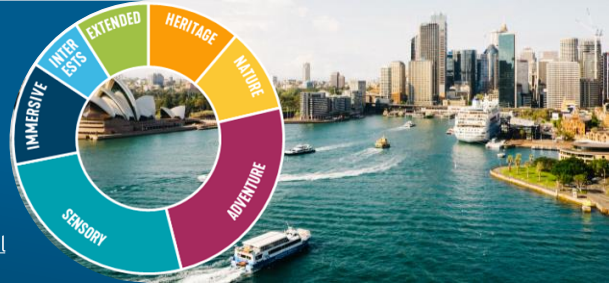


VOLUNTEERING 12%



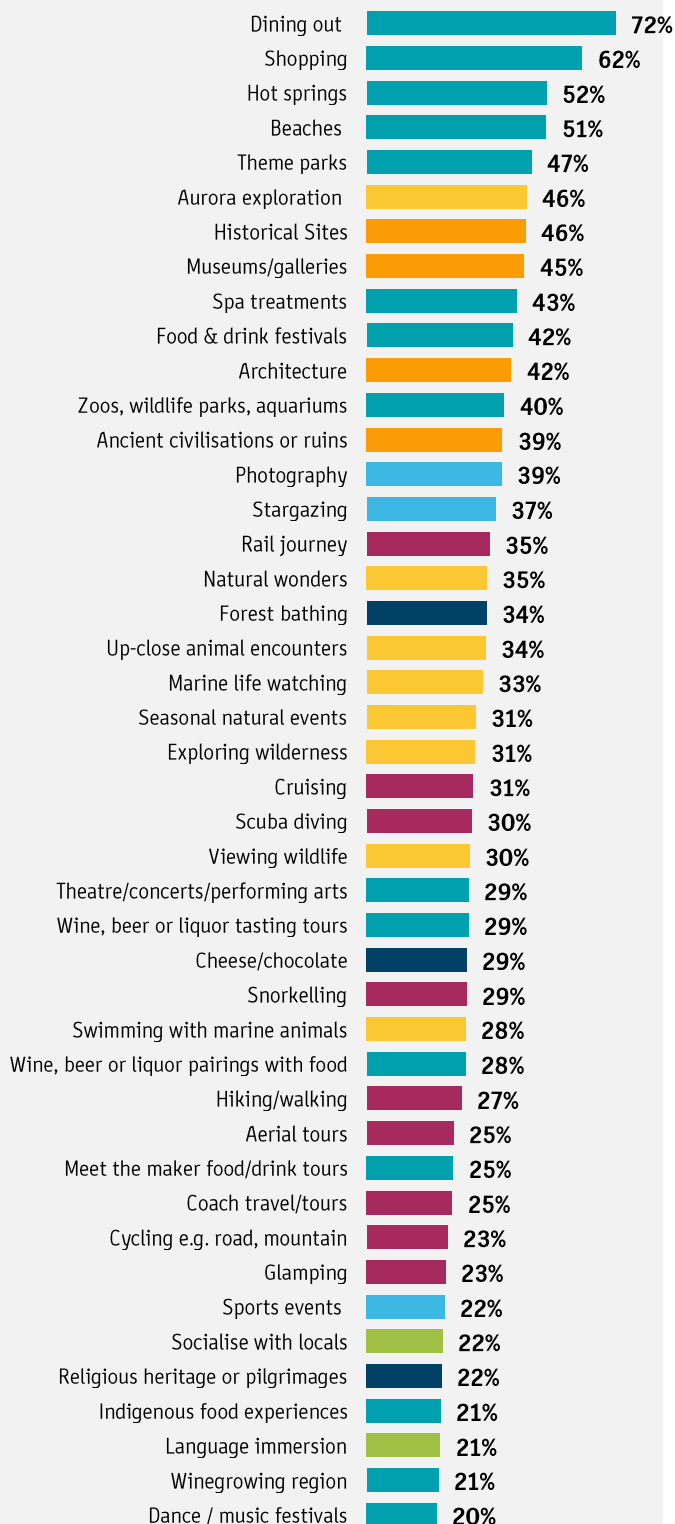
JAPAN INTEREST IN TOURISM EXPERIENCES

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

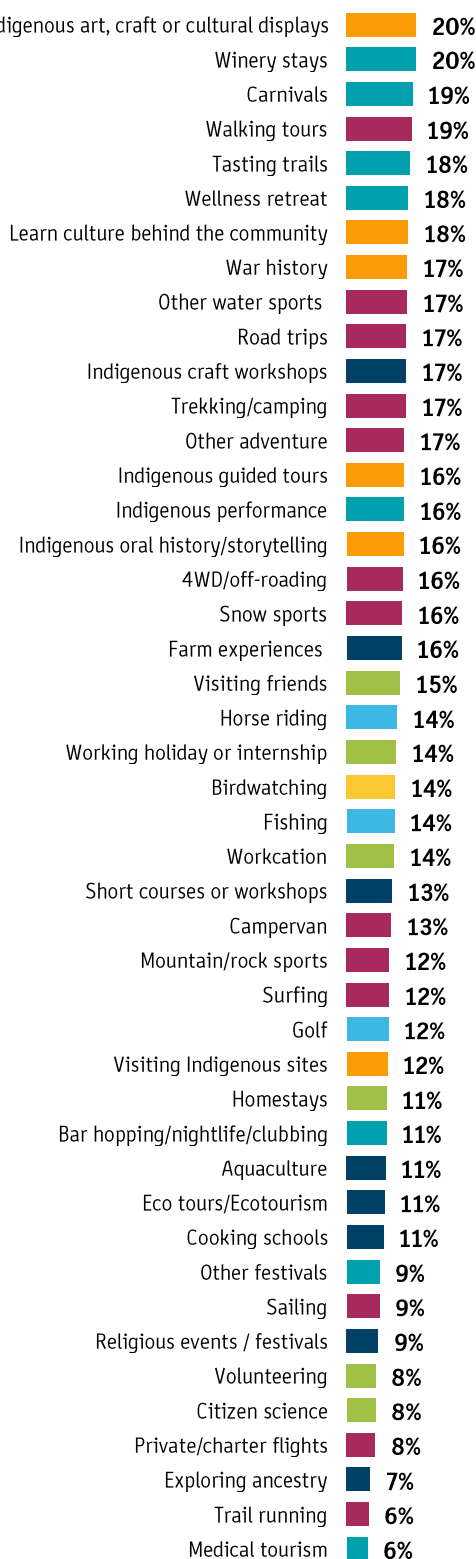


- The top 5 experiences appealing to the Japanese market are all sensory, led by dining out and shopping
- Historical experiences are also in relatively high demand in this market, particularly historical sites, museums/galleries and architecture
- The nature-based experience of greatest interest to the Japanese market is aurora exploration

RANKED 1-44



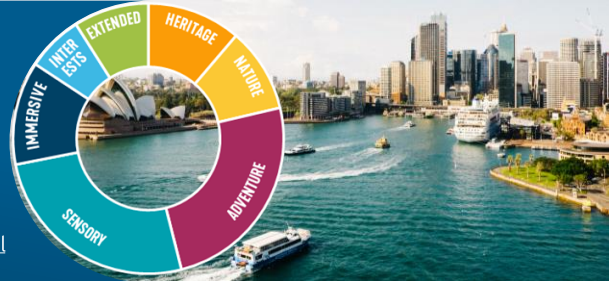
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Japan (n=1,168).

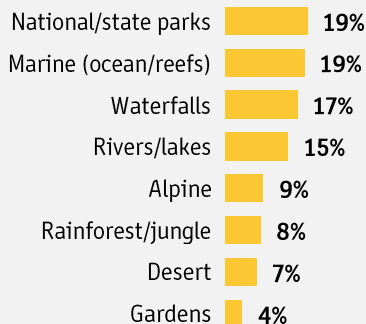
JAPAN INTEREST IN TOURISM SUB-EXPERIENCES

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

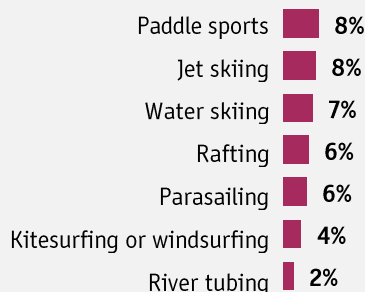


- Street food, casual/mid-range dining and local specialties or unique cuisines all appeal to around a third of the Japanese market
- Japanese travellers have strong interest in shopping for souvenirs, with outlet or duty free their next most appealing type of shopping
- Road cycling is of much greater appeal than mountain biking to the Japanese market

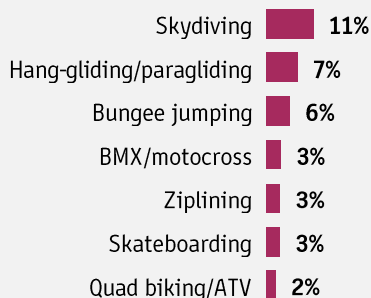
EXPLORING WILDERNESS 31%



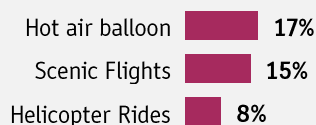
WATER SPORTS 17%



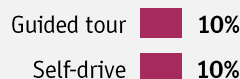
EXTREME SPORTS 17%



AERIAL TOURS/FLIGHTS 25%



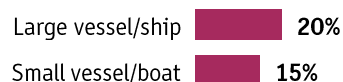
4WD/OFF-ROADING 16%



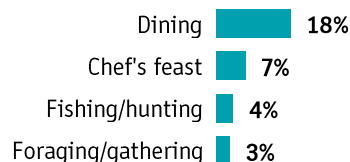
CYCLING 23%



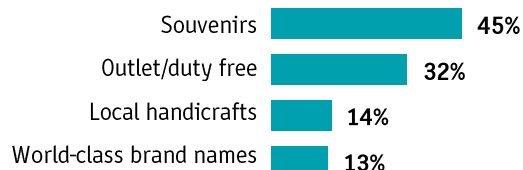
CRUISING 31%



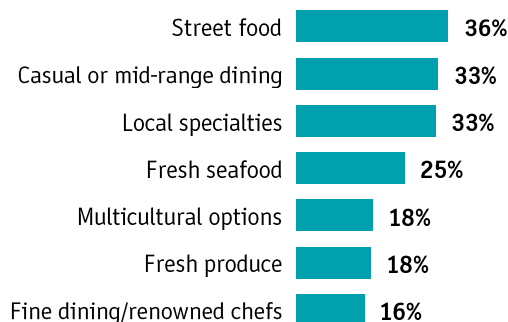
INDIGENOUS FOOD 21%



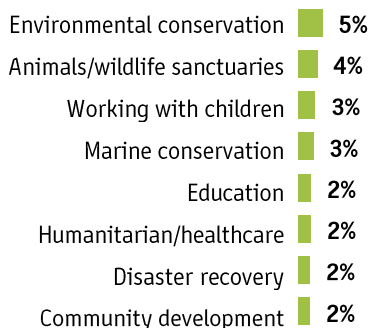
SHOPPING 62%



DINING OUT 72%

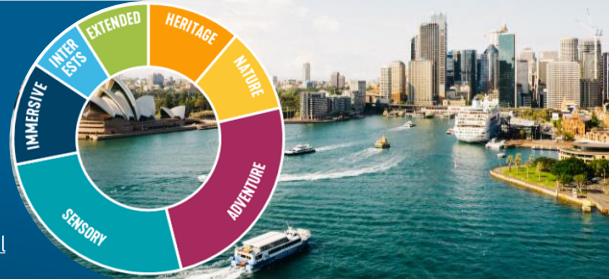


VOLUNTEERING 8%



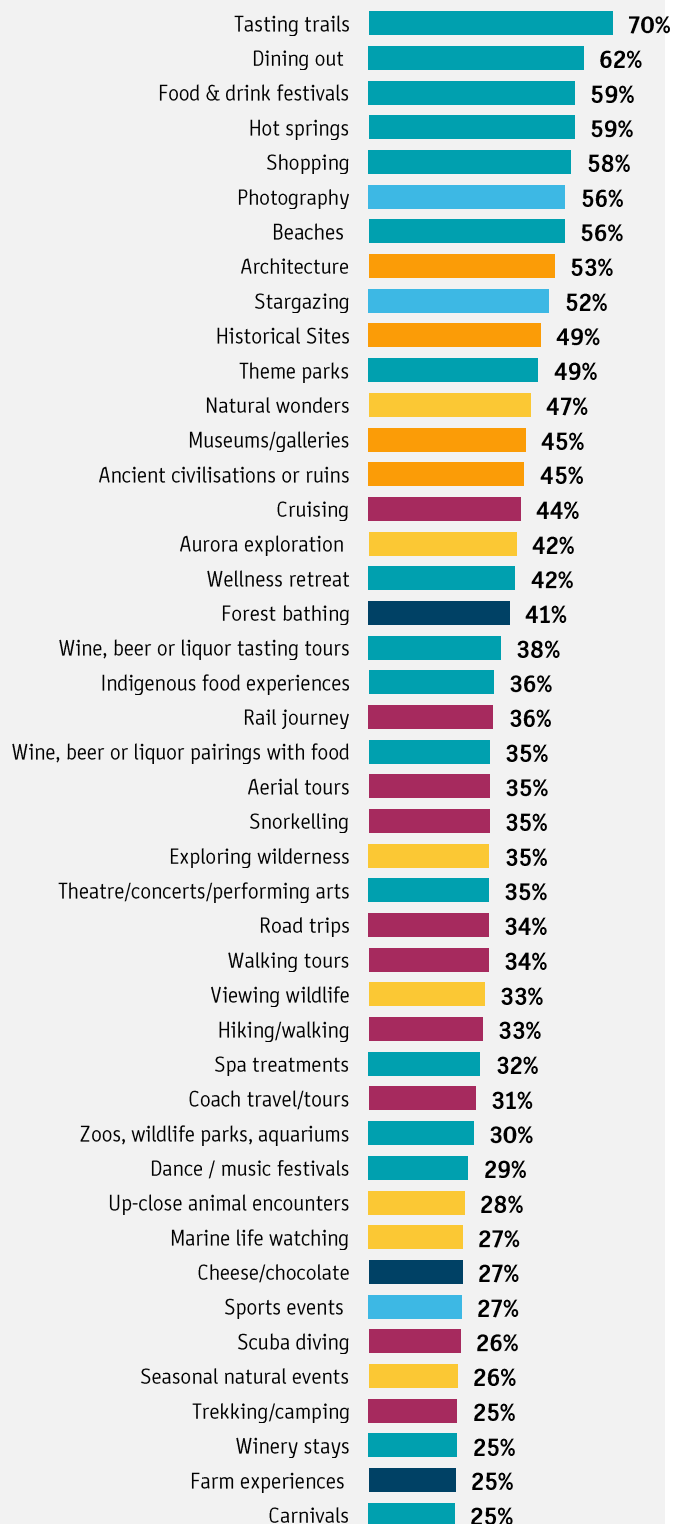
SOUTH KOREA INTEREST IN TOURISM EXPERIENCES

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

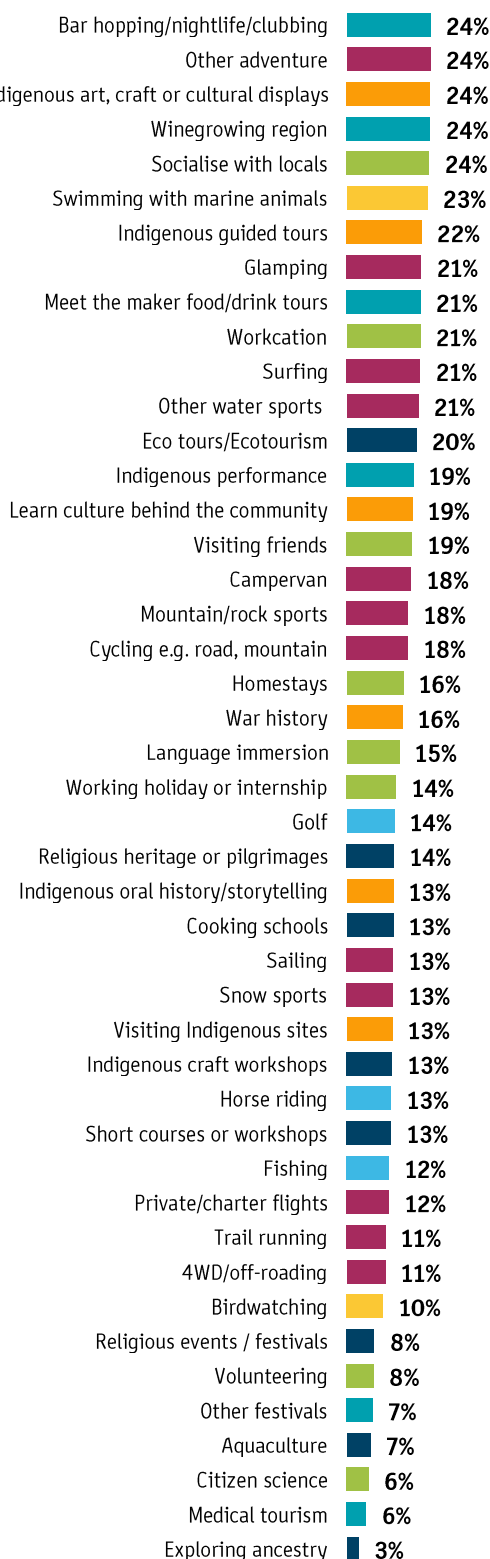


- The top 5 experiences of interest to South Korean travellers are all sensory, with tasting trails of particularly high demand in this market
- Specific interests of photography and stargazing or night sky photography also feature in the top 10 experiences for South Koreans
- Heritage experiences based around architecture and historical or cultural sites round out this market's top 10

RANKED 1-44



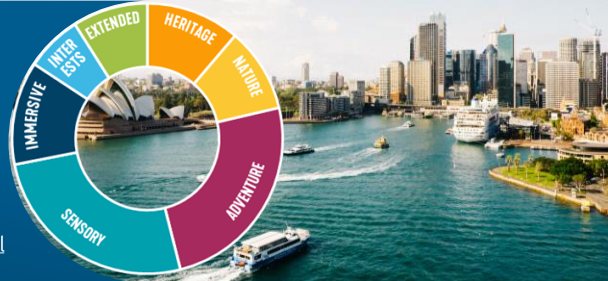
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, South Korea (n=1,220).

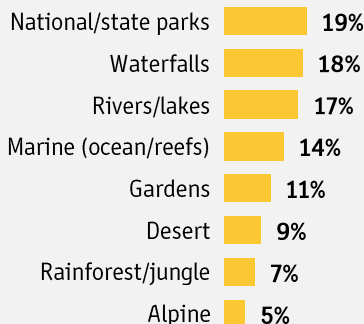
SOUTH KOREA INTEREST IN TOURISM SUB-EXPERIENCES

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

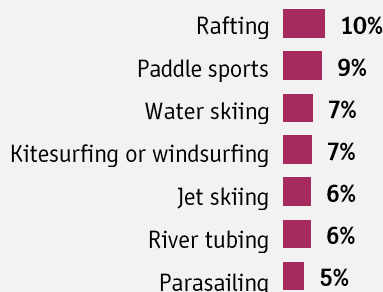


- The South Korean market has a strong preference for large-vessel cruising over smaller vessels
- Road cycling is of much greater interest to this market than mountain biking
- South Korean travellers have strong interest in outlet or duty free shopping

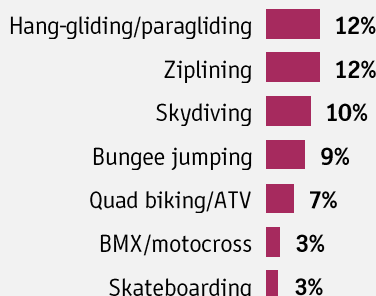
EXPLORING WILDERNESS 35%



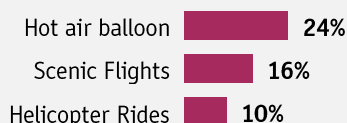
WATER SPORTS 21%



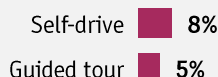
EXTREME SPORTS 24%



AERIAL TOURS/FLIGHTS 35%



4WD/OFF-ROADING 11%



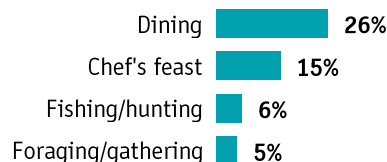
CYCLING 18%



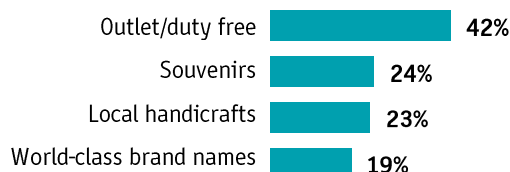
CRUISING 44%



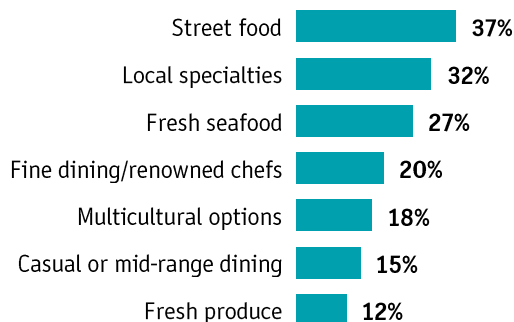
INDIGENOUS FOOD 36%



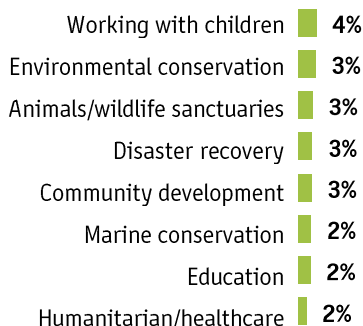
SHOPPING 58%



DINING OUT 62%

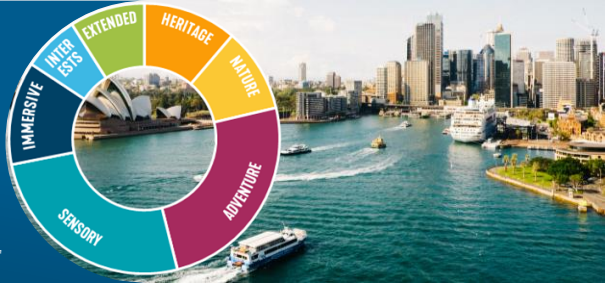


VOLUNTEERING 8%



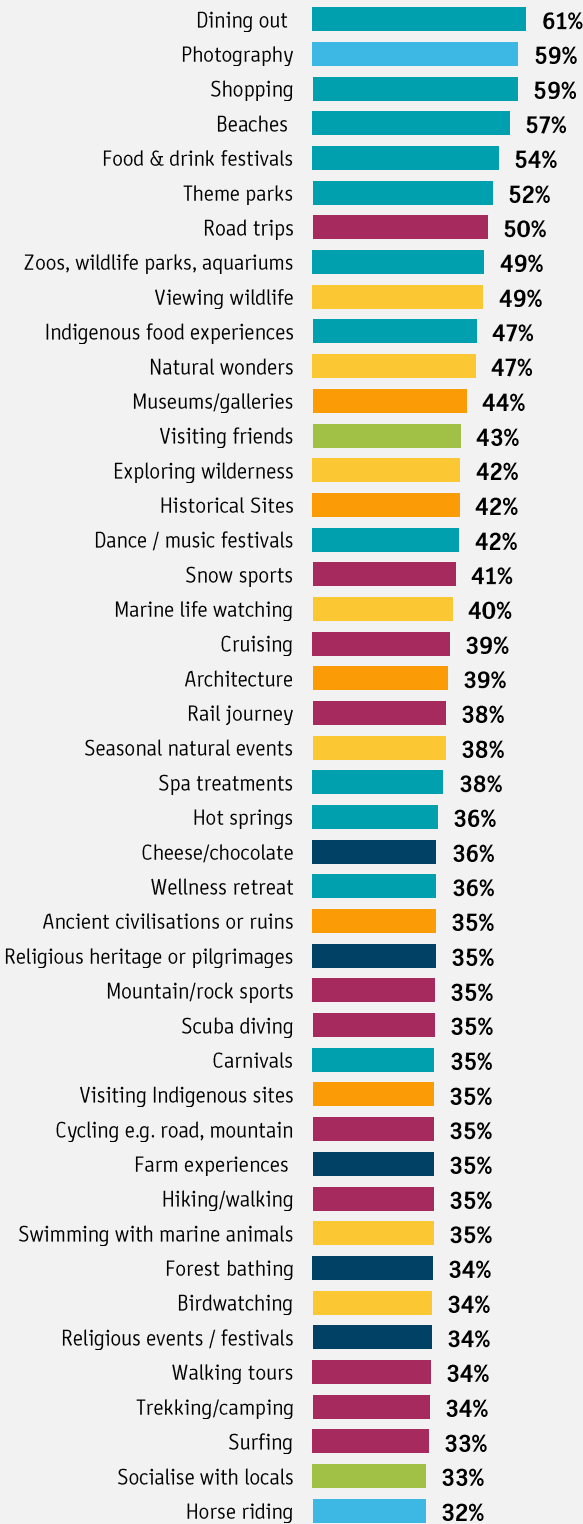
INDIA INTEREST IN TOURISM EXPERIENCES

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

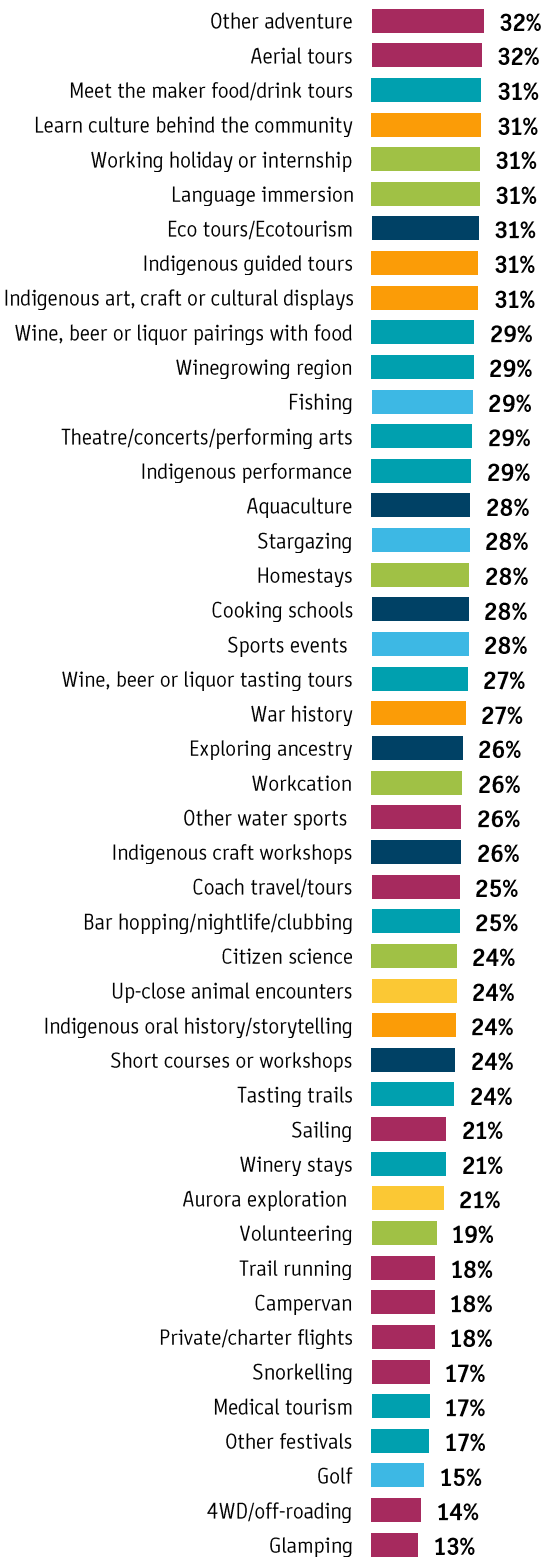


- Sensory experiences account for 7 of the top 10 experiences appealing to Indian travellers
- Photography is the second most popular experience for the Indian market
- Road trips and viewing wildlife in their natural environment round out the top 10 for this market

RANKED 1-44



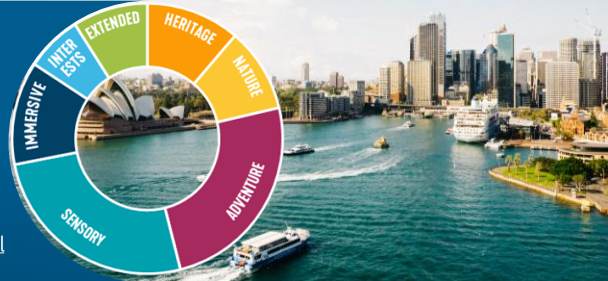
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, India (n=1,563).

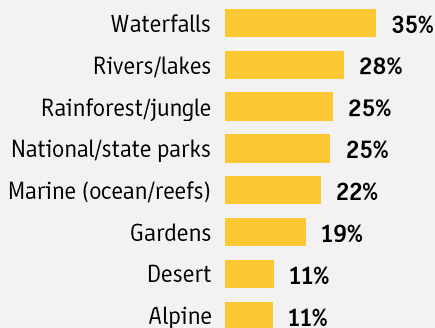
INDIA INTEREST IN TOURISM SUB-EXPERIENCES

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

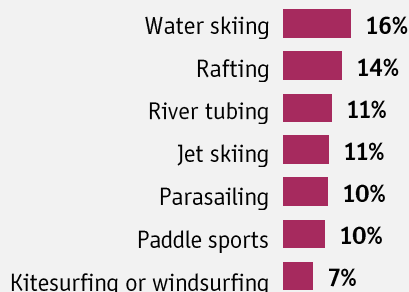


- The Indian market shows strong interest in shopping for local handicrafts
- Street food is their preferred form of dining out, followed by local specialties and fresh seafood or produce
- Indigenous dining also has strong appeal, well ahead of other Indigenous food experiences

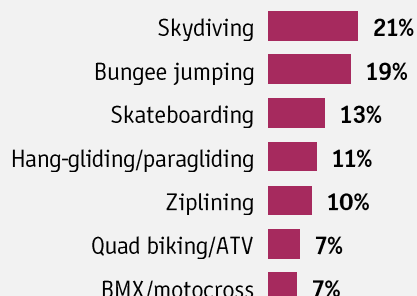
EXPLORING WILDERNESS 42%



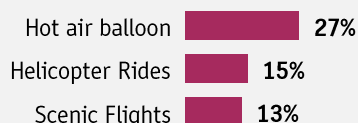
WATER SPORTS 26%



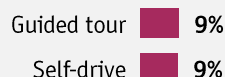
EXTREME SPORTS 32%



AERIAL TOURS/FLIGHTS 32%



4WD/OFF-ROADING 14%



CYCLING 35%



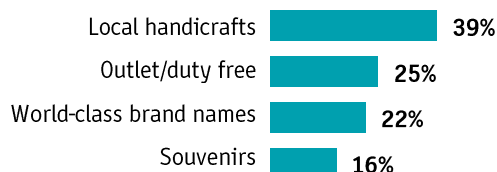
CRUISING 39%



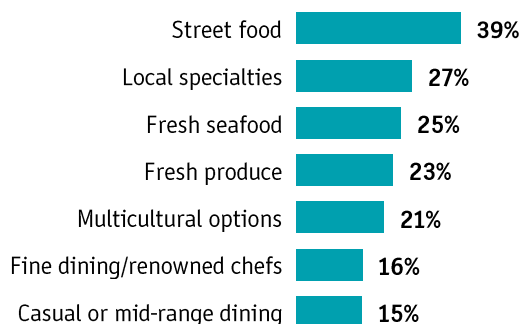
INDIGENOUS FOOD 47%



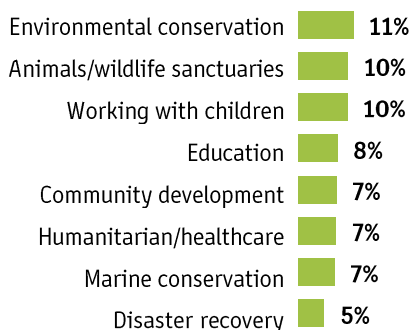
SHOPPING 59%



DINING OUT 61%

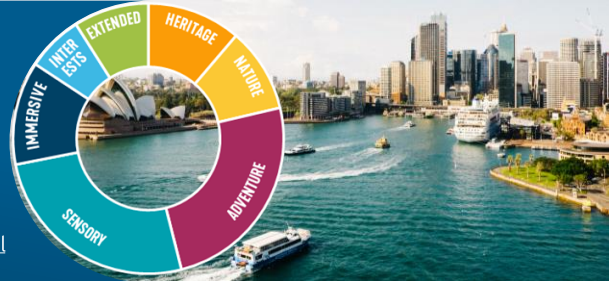


VOLUNTEERING 19%



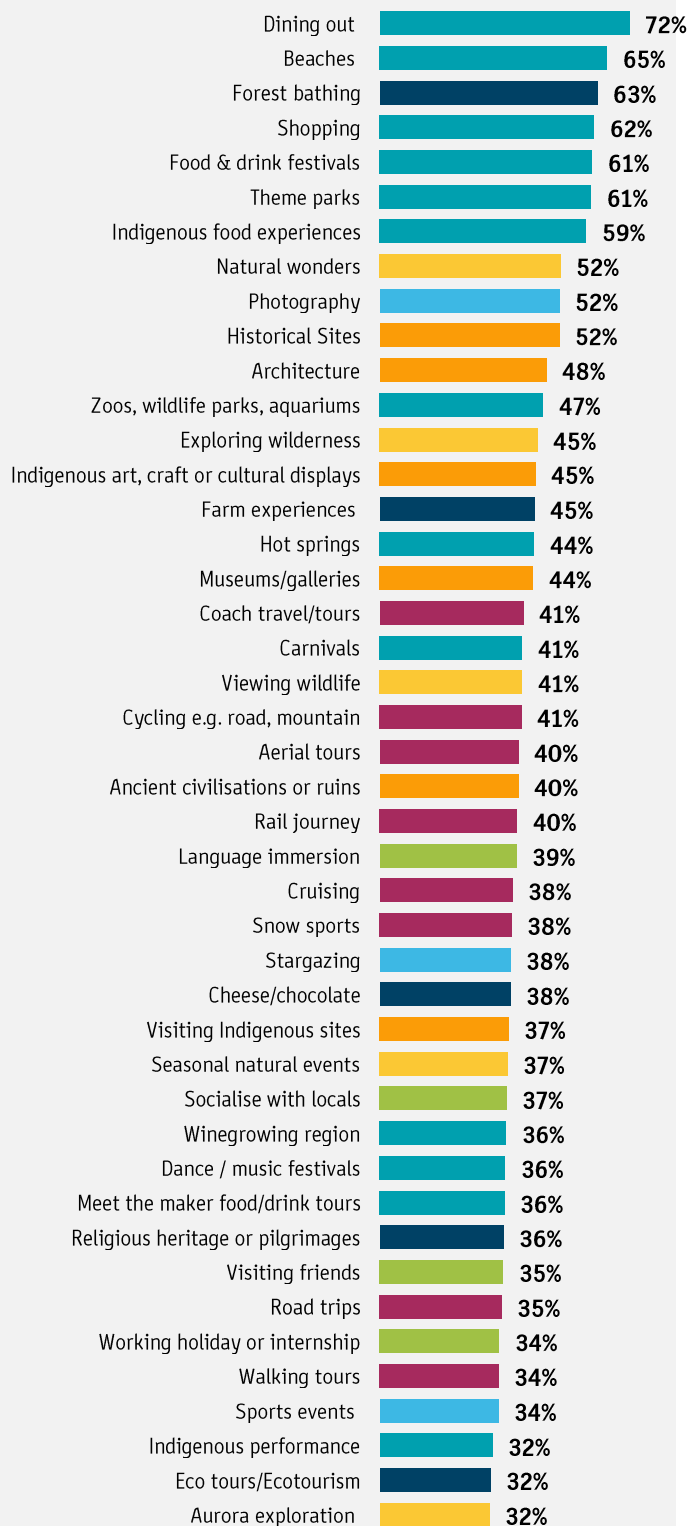
INDONESIA INTEREST IN TOURISM EXPERIENCES

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

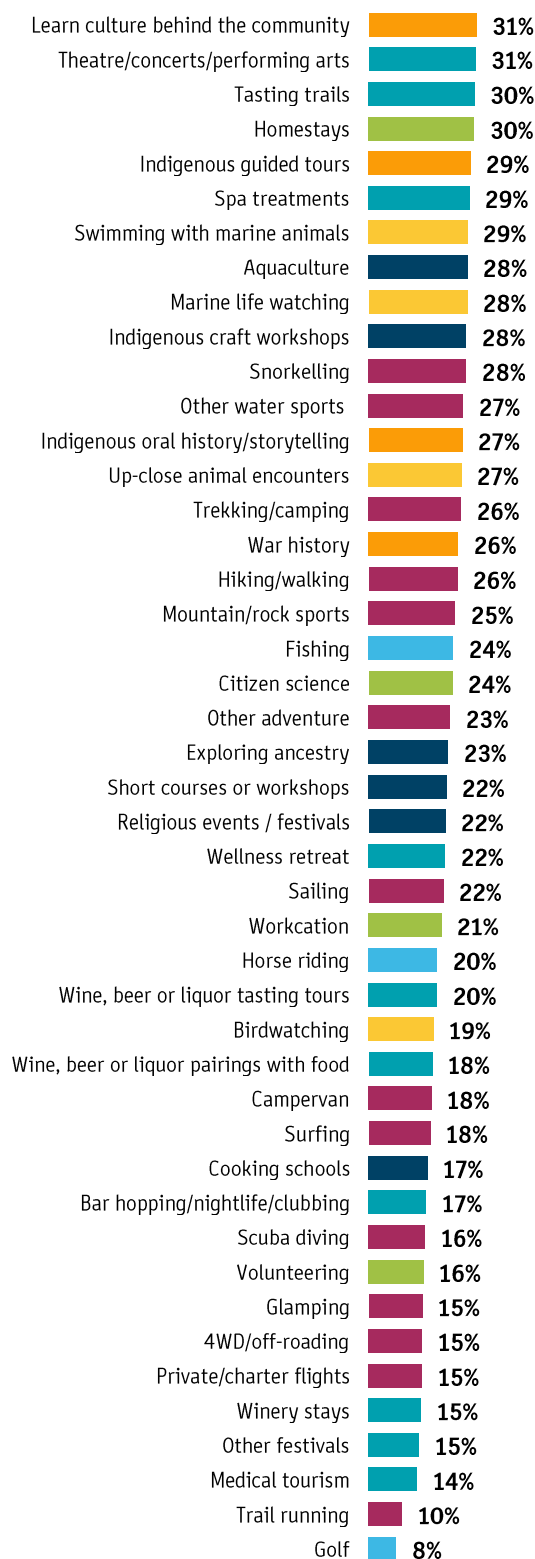


- Sensory experiences account for 6 of the top 10 experiences of greatest interest to the Indonesian market
- Forest bathing is particularly appealing to this market, ranking 3rd of the 89 experiences tested
- Natural wonders, photography and historical sites also appeal to more than half of Indonesian travellers

RANKED 1-44



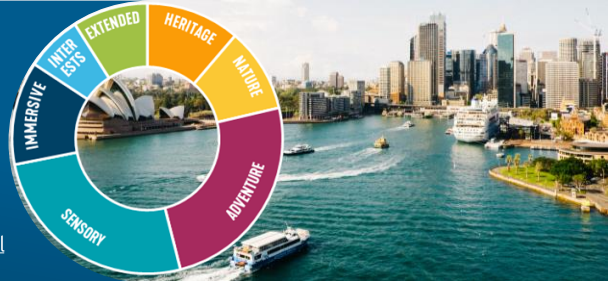
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Indonesia (n=1,006).

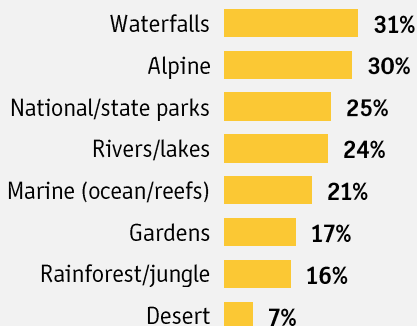
INDONESIA INTEREST IN TOURISM SUB-EXPERIENCES

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

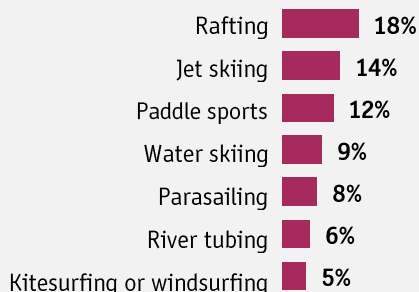


- The Indonesian market shows strong interest in dining and shopping experiences with a strong local bent or connection to place: Indigenous dining, street food, local specialties, and shopping for souvenirs and local handicrafts
- Alongside waterfalls, alpine wilderness areas are of notable interest for this market

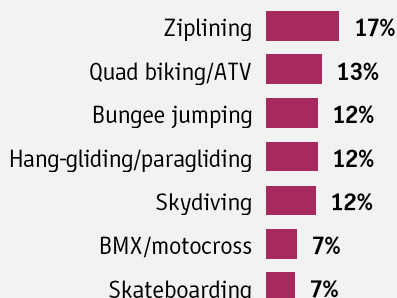
EXPLORING WILDERNESS 45%



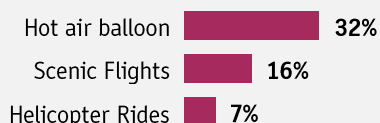
WATER SPORTS 27%



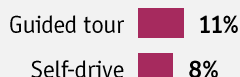
EXTREME SPORTS 23%



AERIAL TOURS/FLIGHTS 40%



4WD/OFF-ROADING 15%



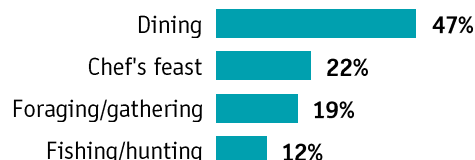
CYCLING 41%



CRUISING 38%



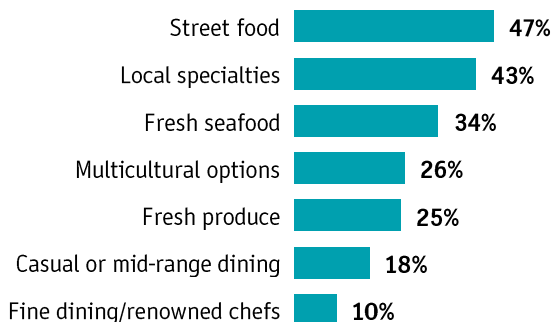
INDIGENOUS FOOD 59%



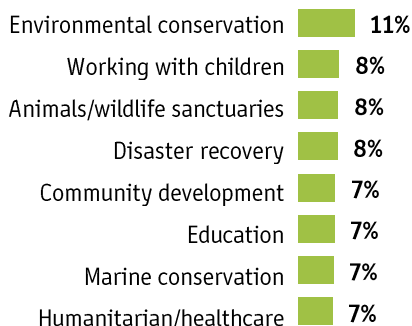
SHOPPING 62%



DINING OUT 72%

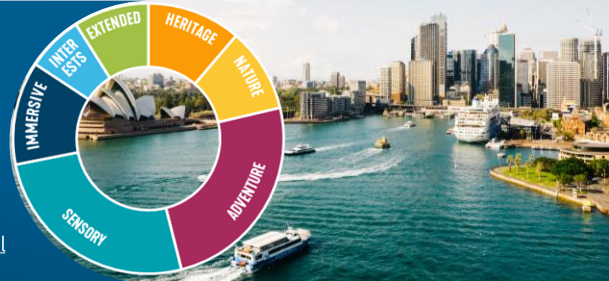


VOLUNTEERING 16%



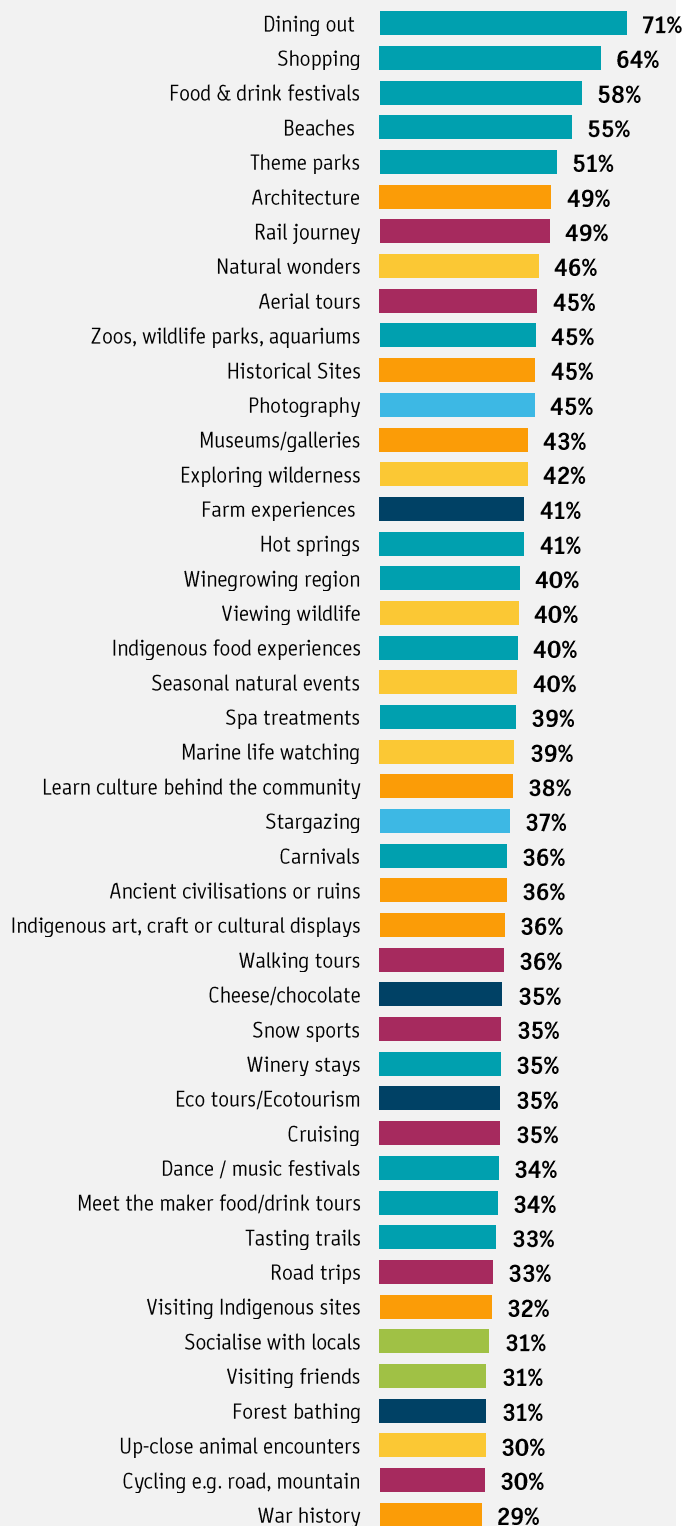
MALAYSIA INTEREST IN TOURISM EXPERIENCES

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

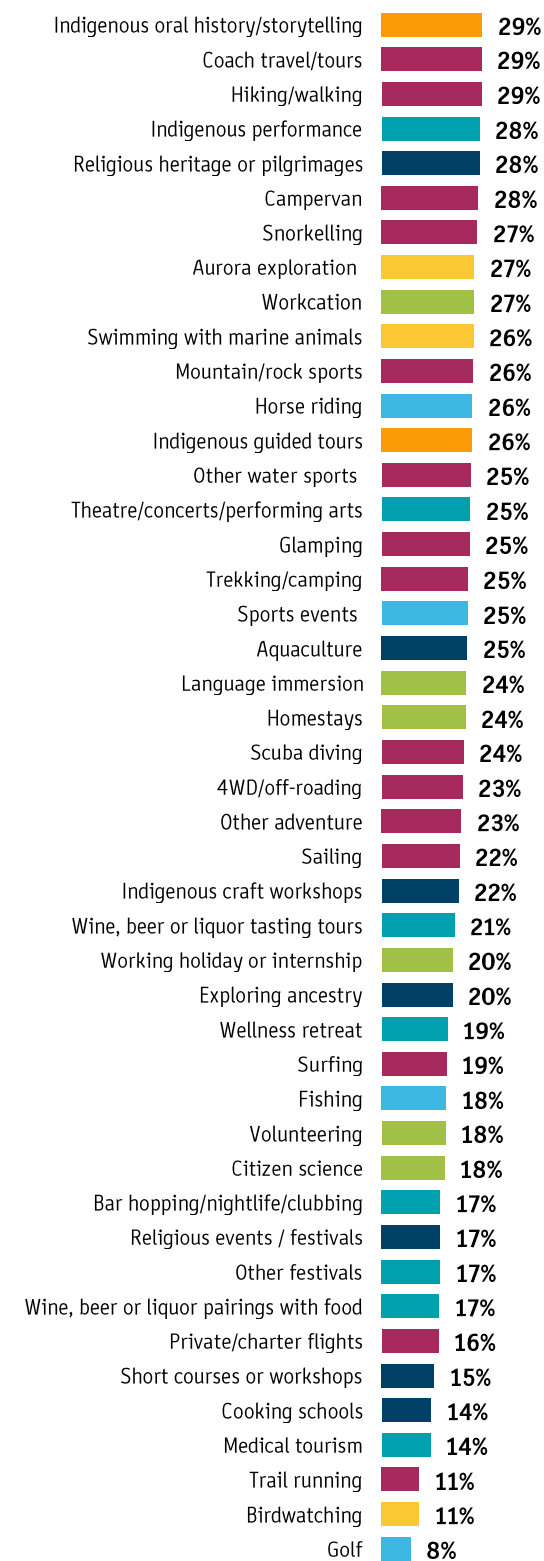


- Popular sensory experiences account for the top 5 experiences, each of interest to at least half of the Malaysian market
- Soft adventure activities of rail journeys and aerial tours are particularly appealing to this market
- Architecture and natural wonders also feature in the top 10 most appealing experiences

RANKED 1-44



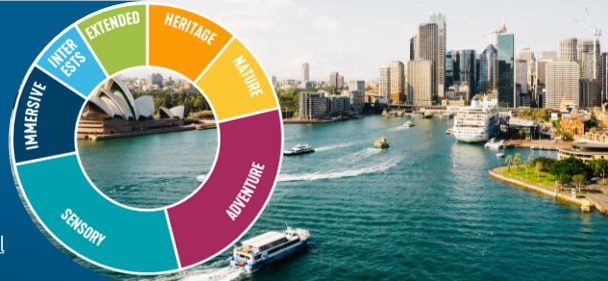
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Malaysia (n=1,039).

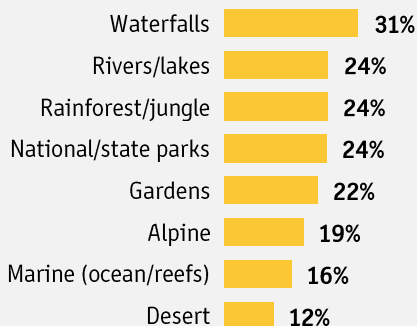
MALAYSIA INTEREST IN TOURISM SUB-EXPERIENCES

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

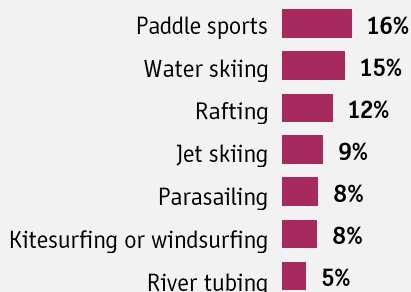


- Malaysian Out of Region Travellers show strong demand for hot air balloon experiences, well ahead of other aerial tours
- Local specialties, fresh seafood and street food are the preferred forms of dining out for this market
- Strong interest in shopping for souvenirs, followed by outlet/duty free and local handicrafts

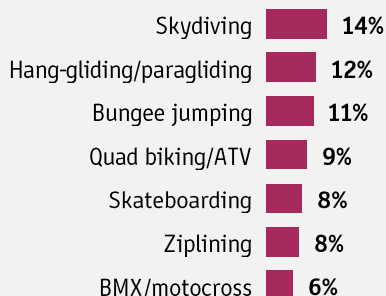
EXPLORING WILDERNESS 42%



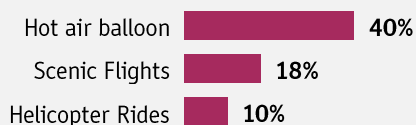
WATER SPORTS 25%



EXTREME SPORTS 23%



AERIAL TOURS/FLIGHTS 45%



4WD/OFF-ROADING 23%



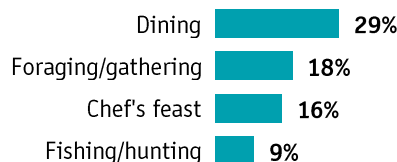
CYCLING 30%



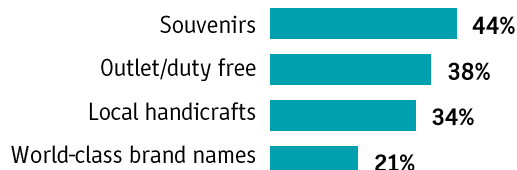
CRUISING 35%



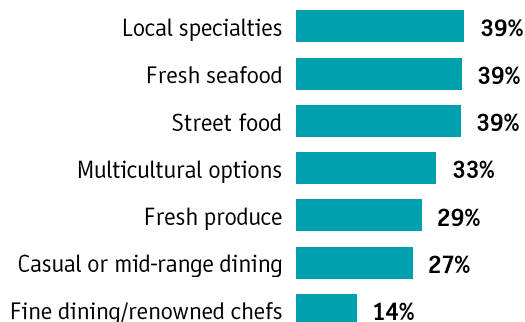
INDIGENOUS FOOD 40%



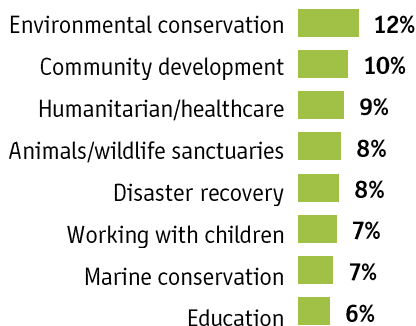
SHOPPING 64%



DINING OUT 71%

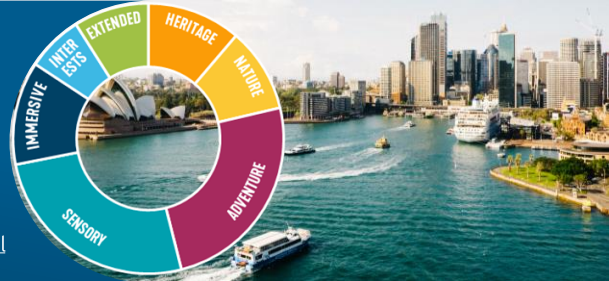


VOLUNTEERING 18%



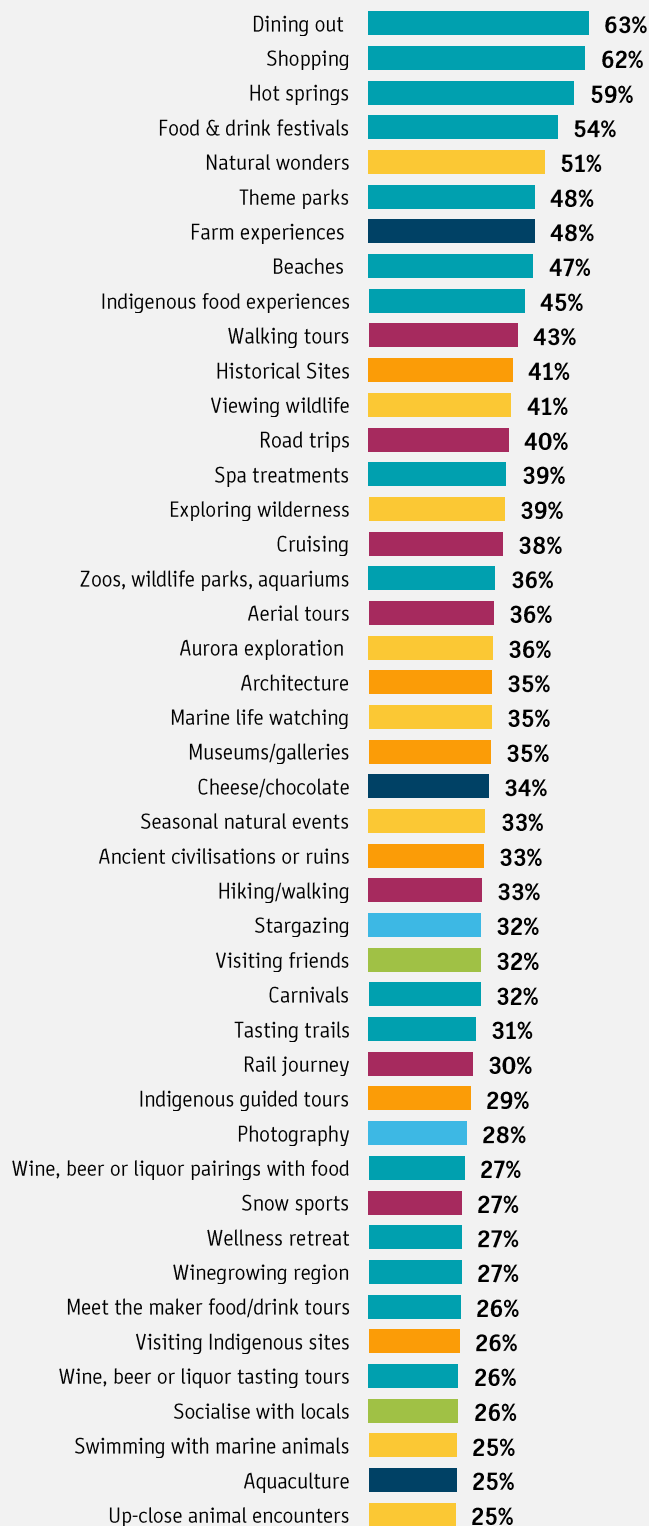
SINGAPORE INTEREST IN TOURISM EXPERIENCES

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

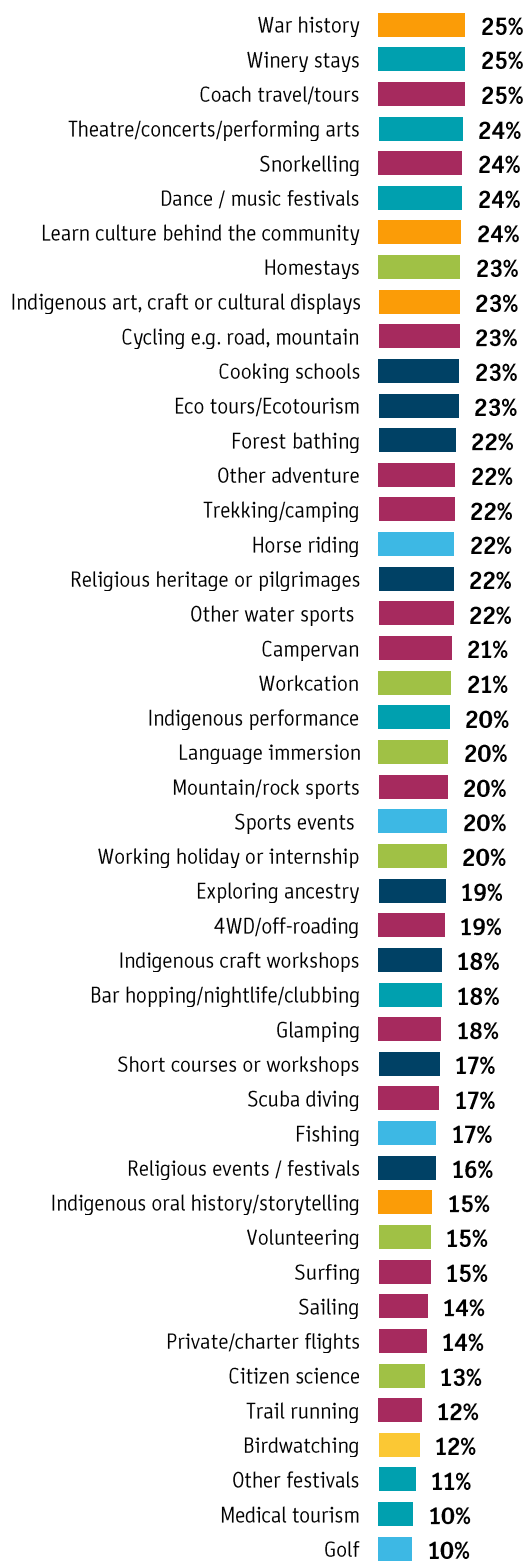


- The Singaporean market has strong demand for sensory experiences, accounting for 7 of the top 10 experiences appealing to this market
- This market also shows strong interest in farm experiences
- Walking tours are the leading adventure experience for Singaporean travellers

RANKED 1-44



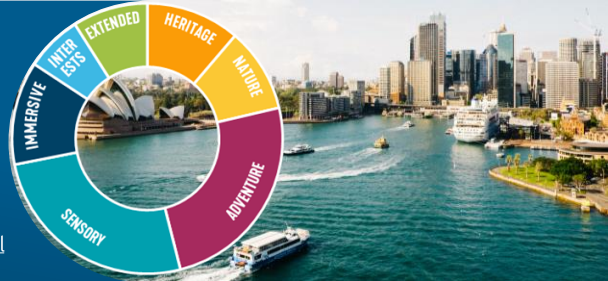
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Singapore (n=1,046).

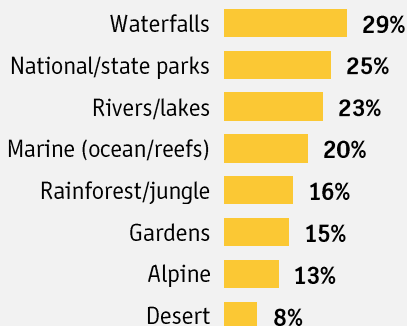
SINGAPORE INTEREST IN TOURISM SUB-EXPERIENCES

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

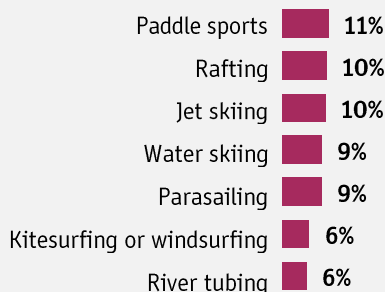


- Around a third of Singaporean travellers each are interested in outlet/duty free shopping, shopping for souvenirs and local handicrafts
- Clear preference for street food as the leading dining out experience, and Indigenous dining as the top Indigenous food experience
- More than twice as many Singaporean travellers are interested in cruise ships vs. smaller-vessel cruising

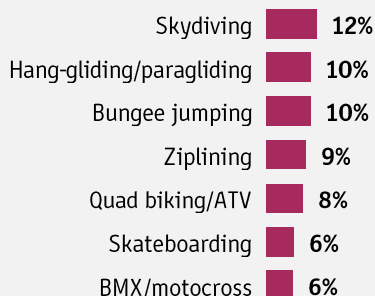
EXPLORING WILDERNESS 39%



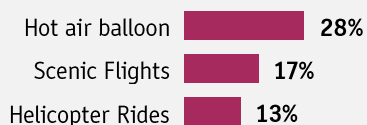
WATER SPORTS 22%



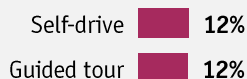
EXTREME SPORTS 22%



AERIAL TOURS/FLIGHTS 36%



4WD/OFF-ROADING 19%



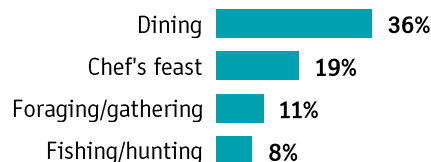
CYCLING 23%



CRUISING 38%



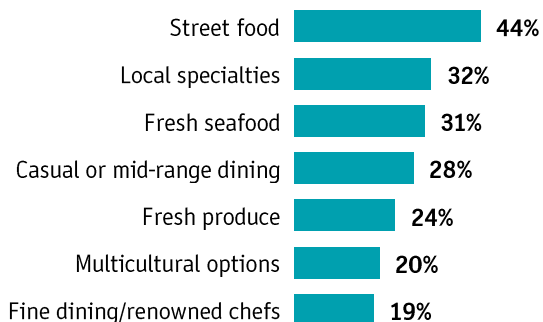
INDIGENOUS FOOD 45%



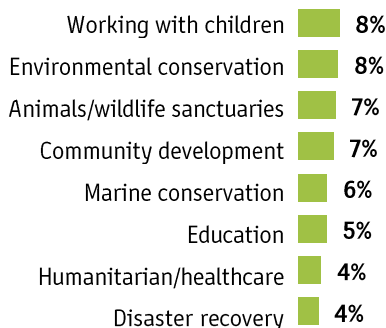
SHOPPING 62%



DINING OUT 63%

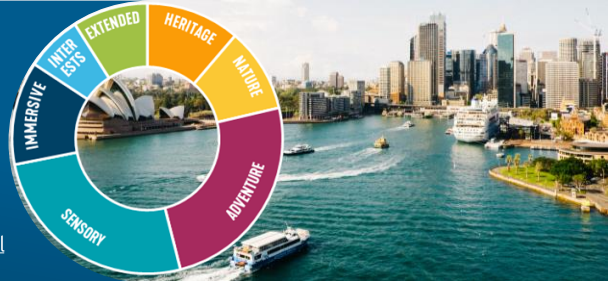


VOLUNTEERING 15%



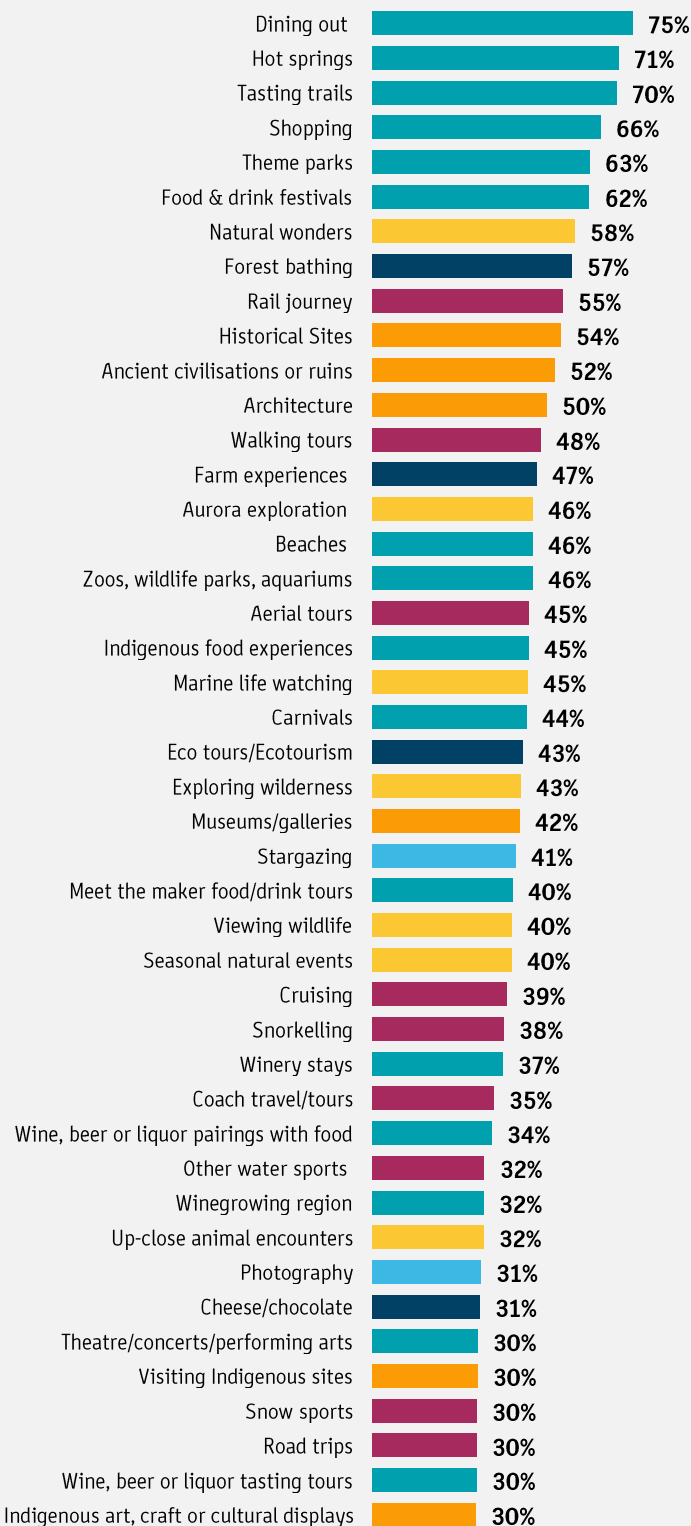
TAIWAN INTEREST IN TOURISM EXPERIENCES

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

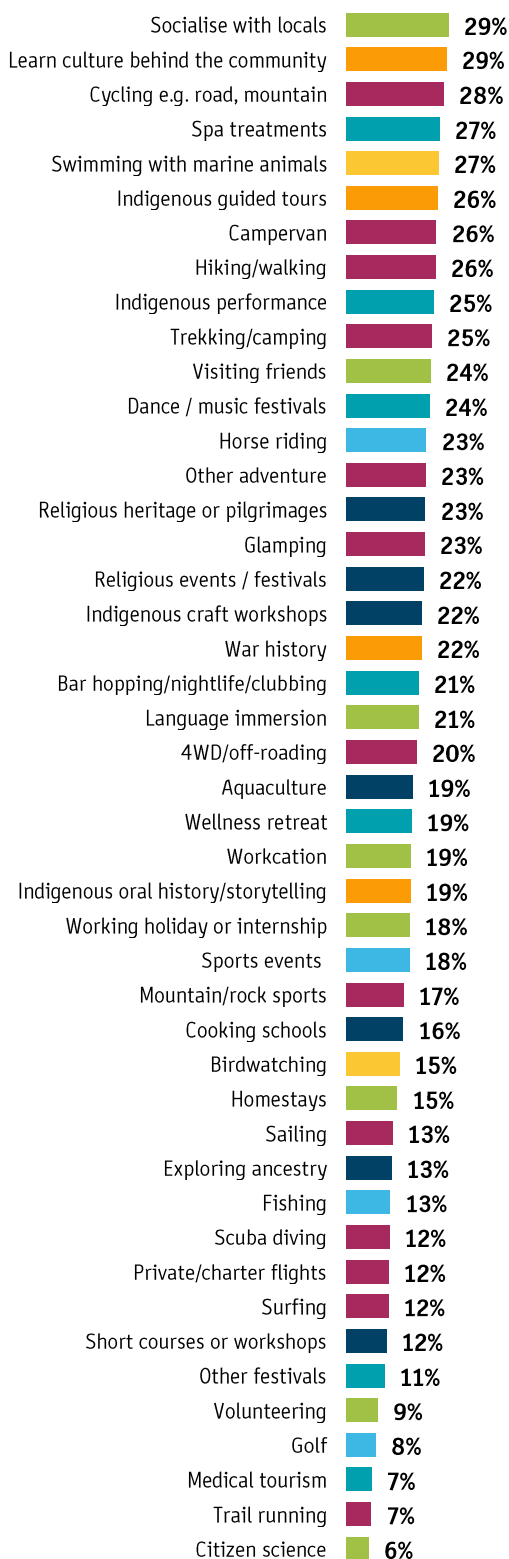


- The top 6 experiences for the Taiwan market are all sensory
- Forest bathing is of particularly strong interest in this market, attracting similar demand as visiting natural landmarks or wonders
- Rail journeys are the leading adventure experience for Taiwanese travellers

RANKED 1-44



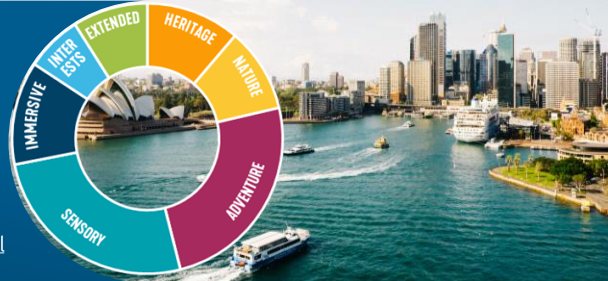
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Taiwan (n=1,005).

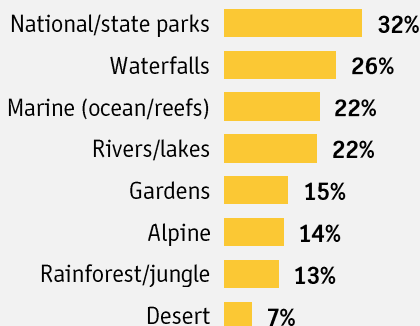
TAIWAN INTEREST IN TOURISM SUB-EXPERIENCES

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

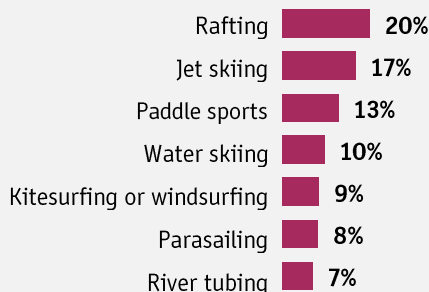


- Taiwanese travellers have strong demand for local specialties and street food as dining out experiences
- Indigenous dining is the leading Indigenous food experience, followed by a chef's feast with native ingredients
- Strong preference for road cycling over mountain biking, and cruise ships over smaller-vessel cruising

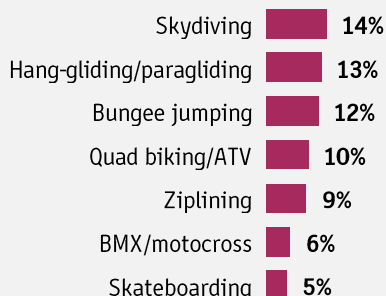
EXPLORING WILDERNESS 43%



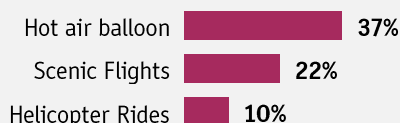
WATER SPORTS 32%



EXTREME SPORTS 23%



AERIAL TOURS/FLIGHTS 45%



4WD/OFF-ROADING 20%



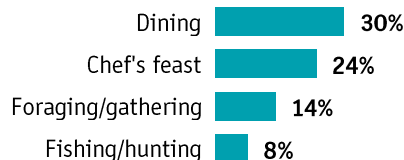
CYCLING 28%



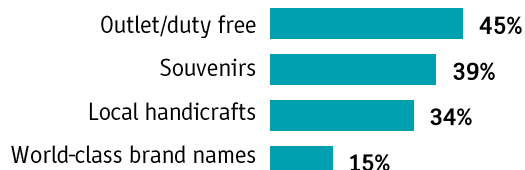
CRUISING 39%



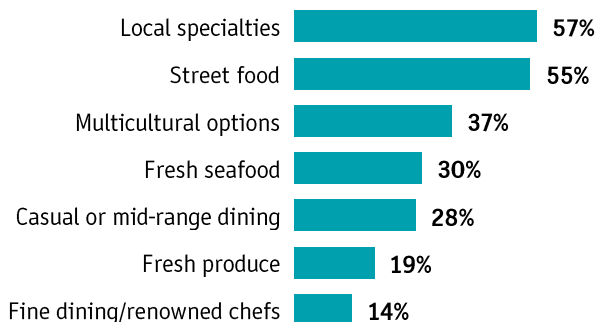
INDIGENOUS FOOD 45%



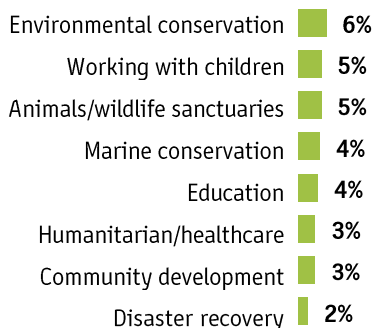
SHOPPING 66%



DINING OUT 75%

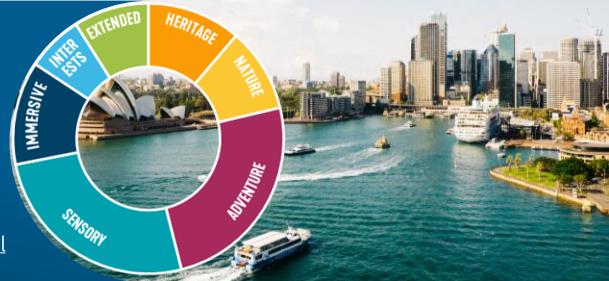


VOLUNTEERING 9%



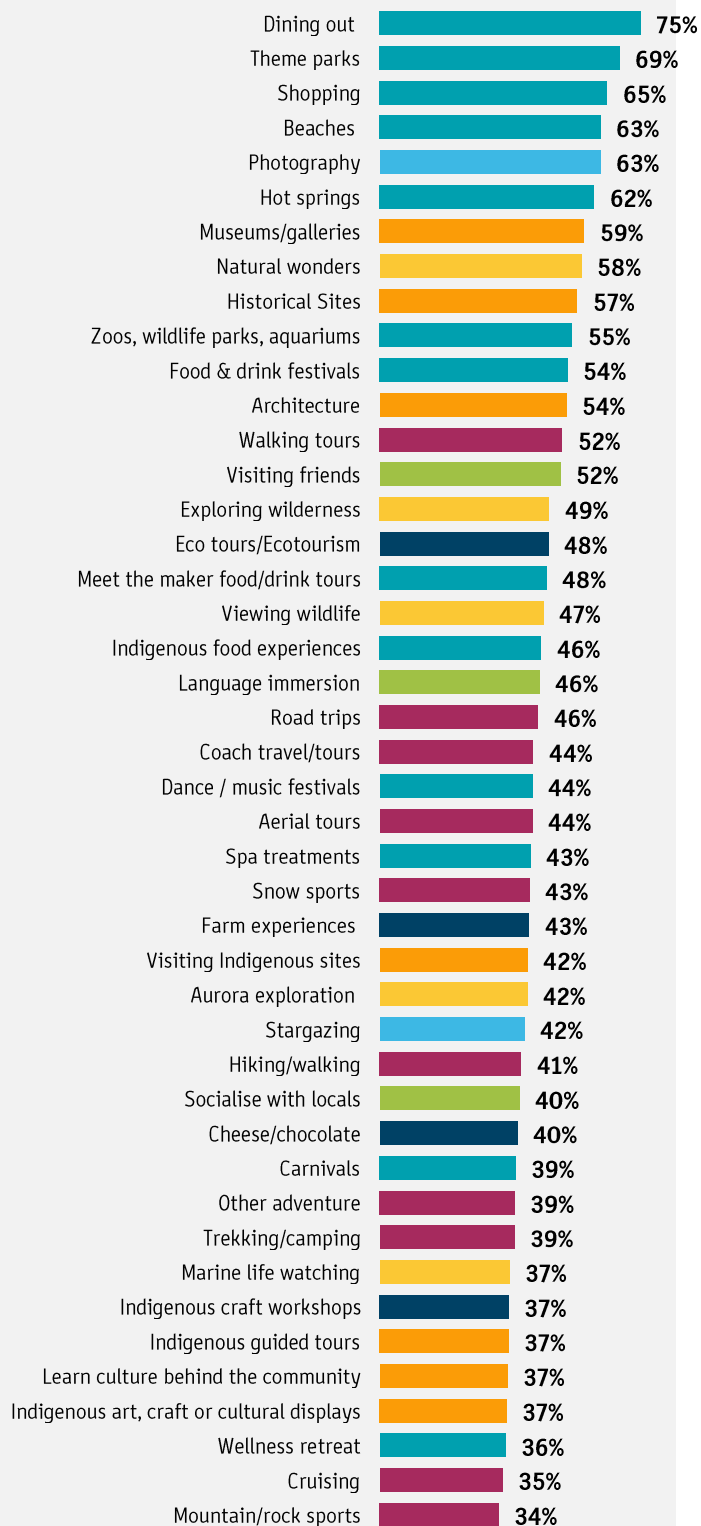
PHILIPPINES INTEREST IN TOURISM EXPERIENCES

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

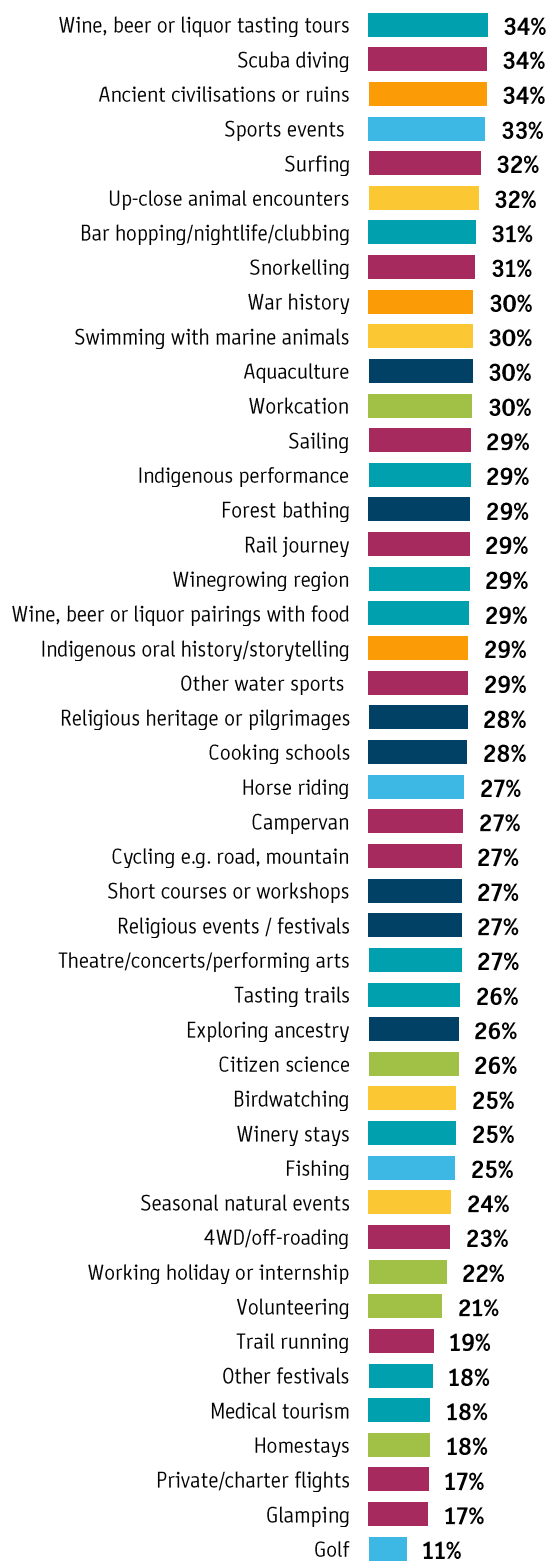


- Strong demand among the Philippines market for sensory experiences
- Photography is particularly appealing to this market, ranking 5th in interest of the 89 experiences tested
- Museums/galleries, historical sites, and architecture or notable buildings are the top heritage experiences, appealing to more than half

RANKED 1-44



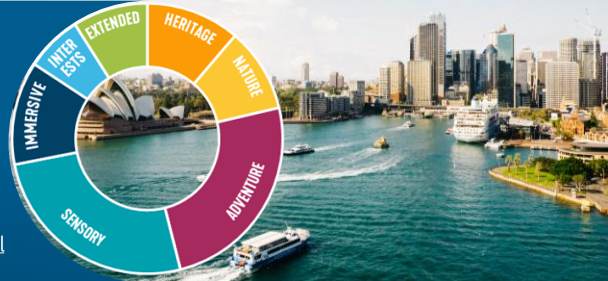
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Philippines (n=838).

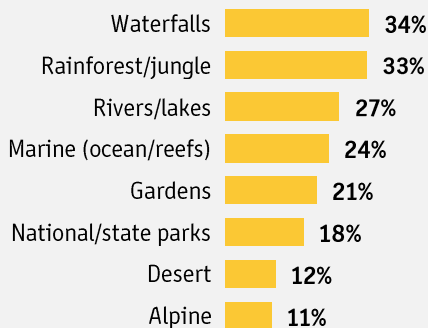
PHILIPPINES INTEREST IN TOURISM SUB-EXPERIENCES

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

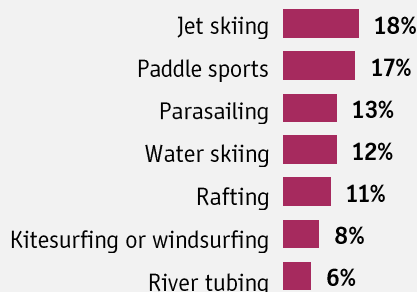


- Travellers from the Philippines have strong demand for street food as the leading dining out experiences
- Similar levels of interest for mountain biking vs. road cycling, and large-vessel vs. smaller-vessel cruising
- Half of the Philippines market are interested in shopping for souvenirs

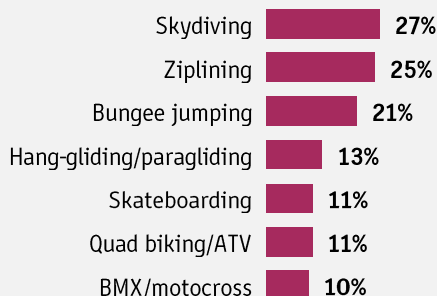
EXPLORING WILDERNESS 49%



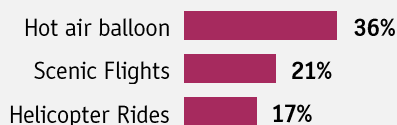
WATER SPORTS 29%



EXTREME SPORTS 39%



AERIAL TOURS/FLIGHTS 44%



4WD/OFF-ROADING 23%



CYCLING 27%



CRUISING 35%



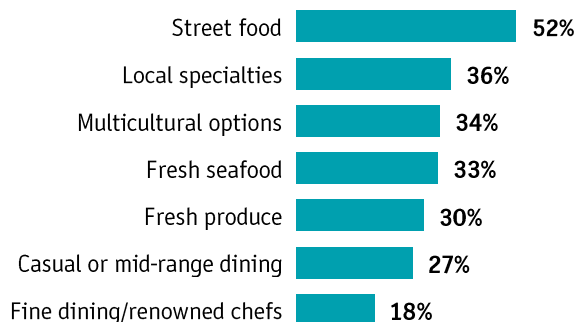
INDIGENOUS FOOD 46%



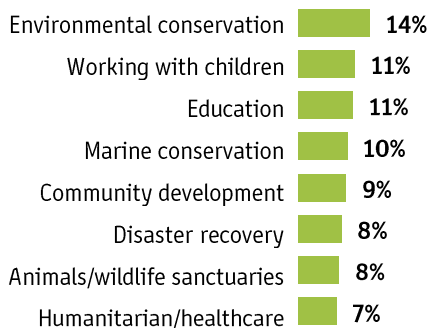
SHOPPING 65%



DINING OUT 75%

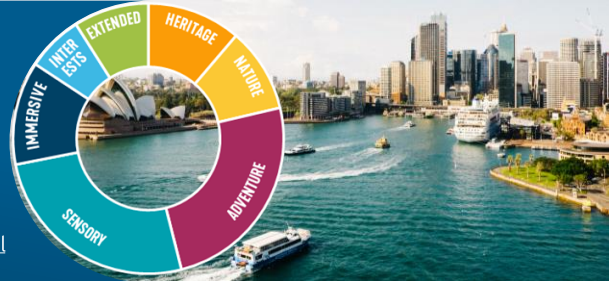


VOLUNTEERING 21%



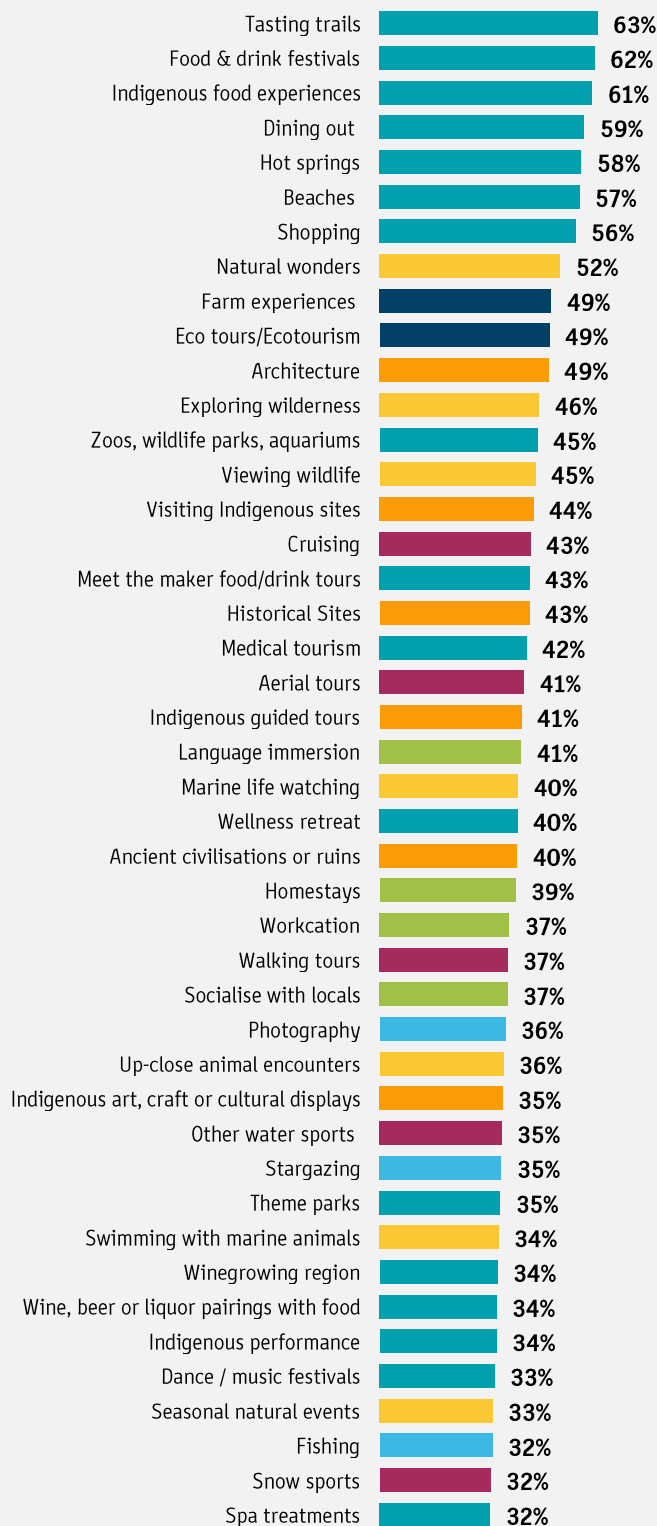
VIETNAM INTEREST IN TOURISM EXPERIENCES

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

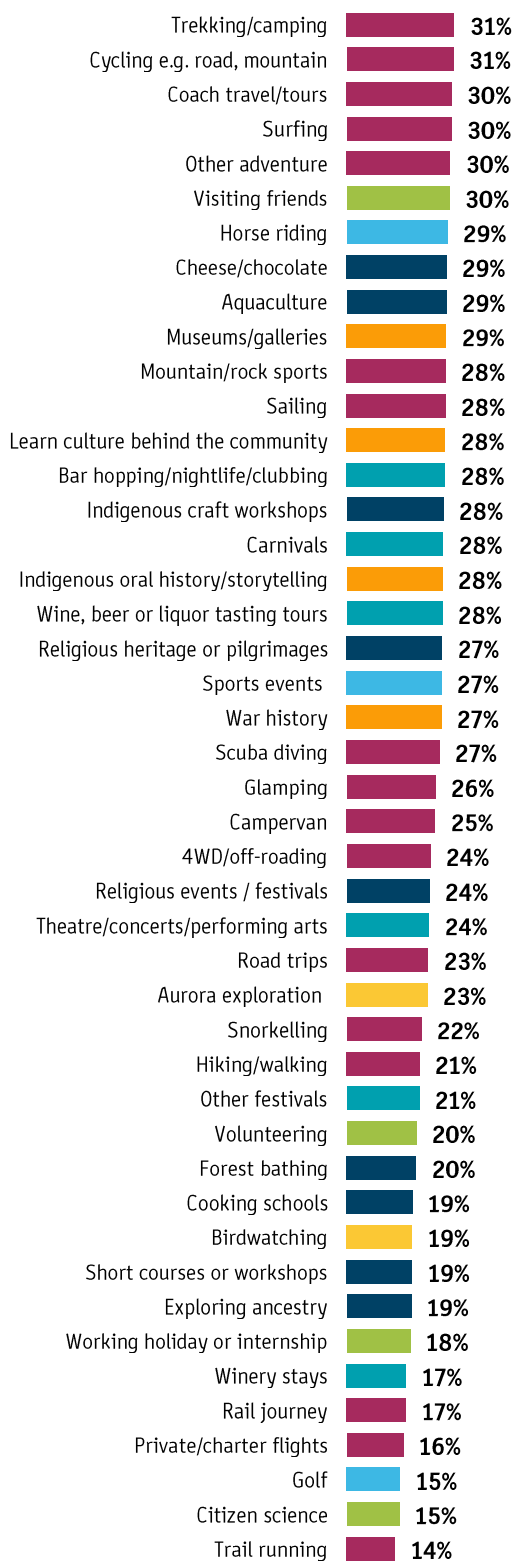


- Sensory experiences account for 7 of the top 10 experiences in the Vietnamese market, led by tasting trails
- Immersive experiences of farm experiences and ecotourism appeal strongly in this market, with almost half interested
- Natural landmarks and wonders also feature in the top 10

RANKED 1-44



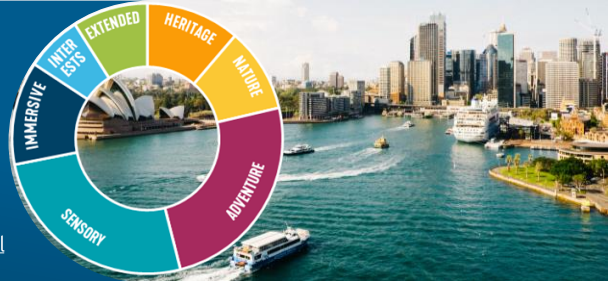
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Vietnam (n=749).

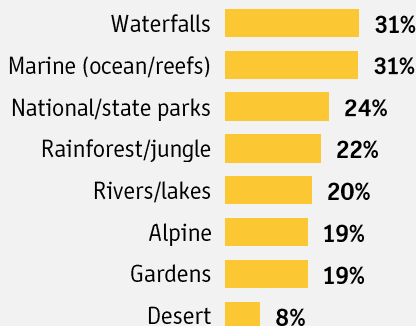
VIETNAM INTEREST IN TOURISM SUB-EXPERIENCES

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

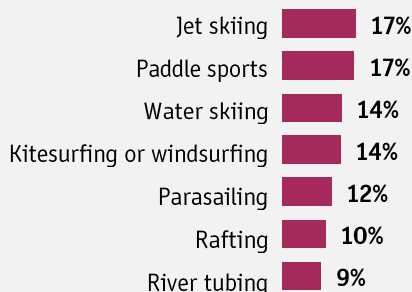


- Vietnamese travellers have strong interest street food and local specialties as dining out experiences, as well as Indigenous dining
- Waterfalls and marine areas are the leading forms of nature/wilderness within this market
- The Vietnamese market is most interested in shopping for souvenirs, followed by local handicrafts and outlet or duty free shopping

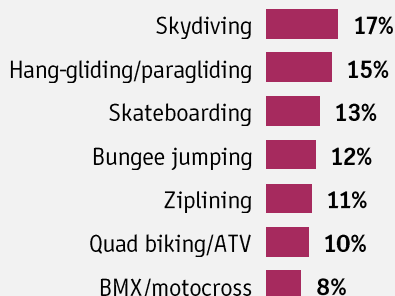
EXPLORING WILDERNESS 46%



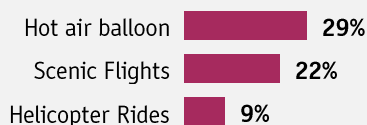
WATER SPORTS 35%



EXTREME SPORTS 30%



AERIAL TOURS/FLIGHTS 41%



4WD/OFF-ROADING 24%



CYCLING 31%



CRUISING 43%



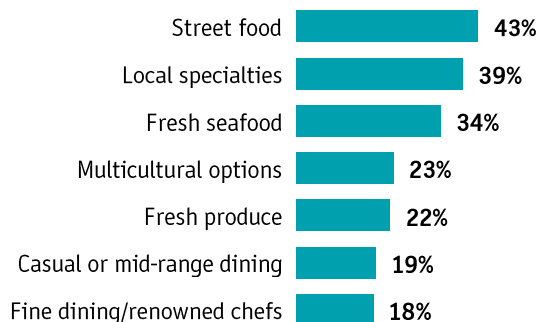
INDIGENOUS FOOD 61%



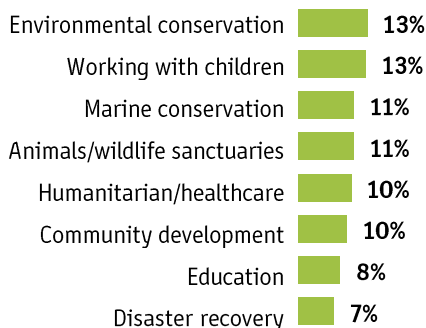
SHOPPING 56%



DINING OUT 59%

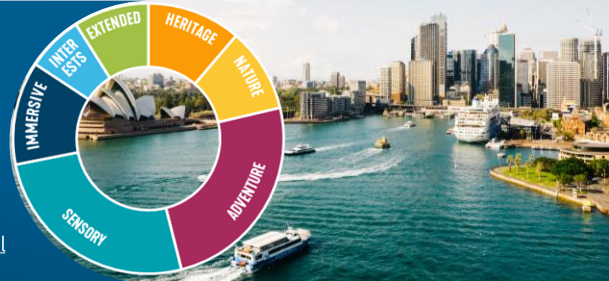


VOLUNTEERING 20%



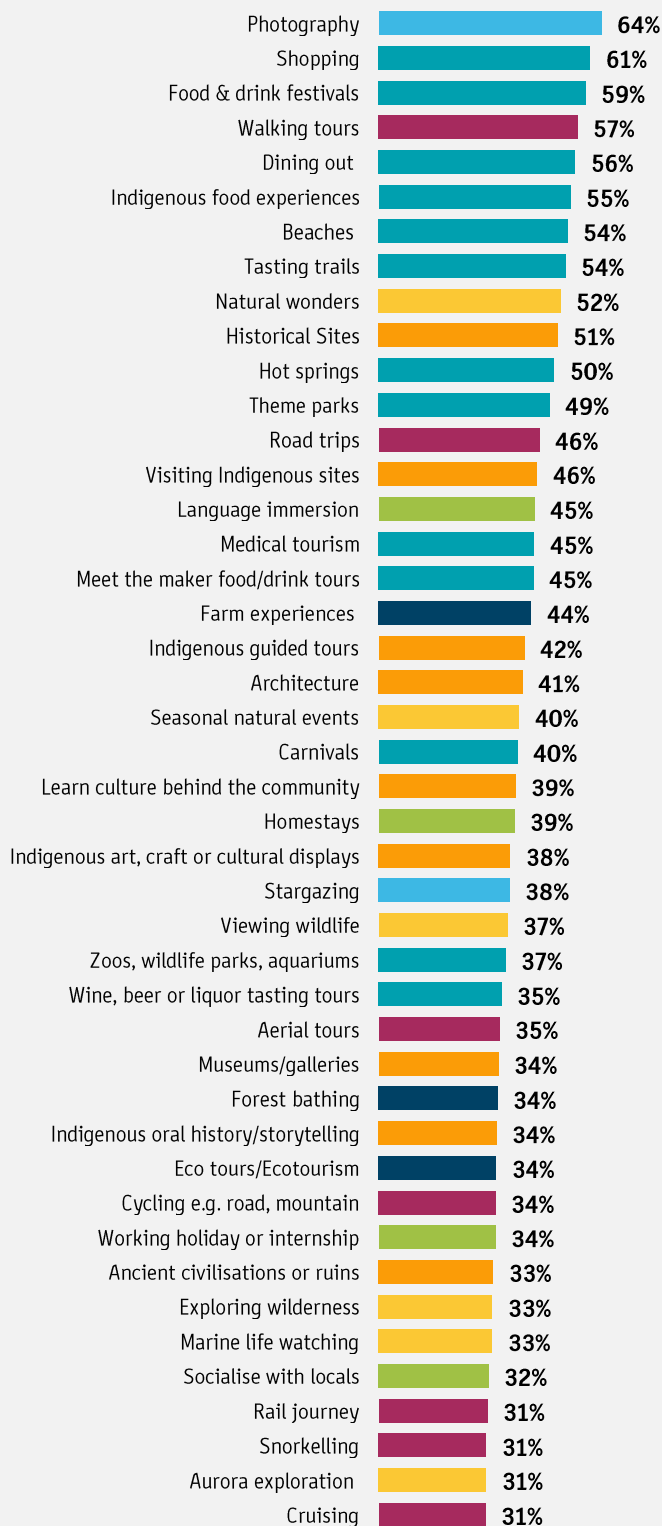
THAILAND INTEREST IN TOURISM EXPERIENCES

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

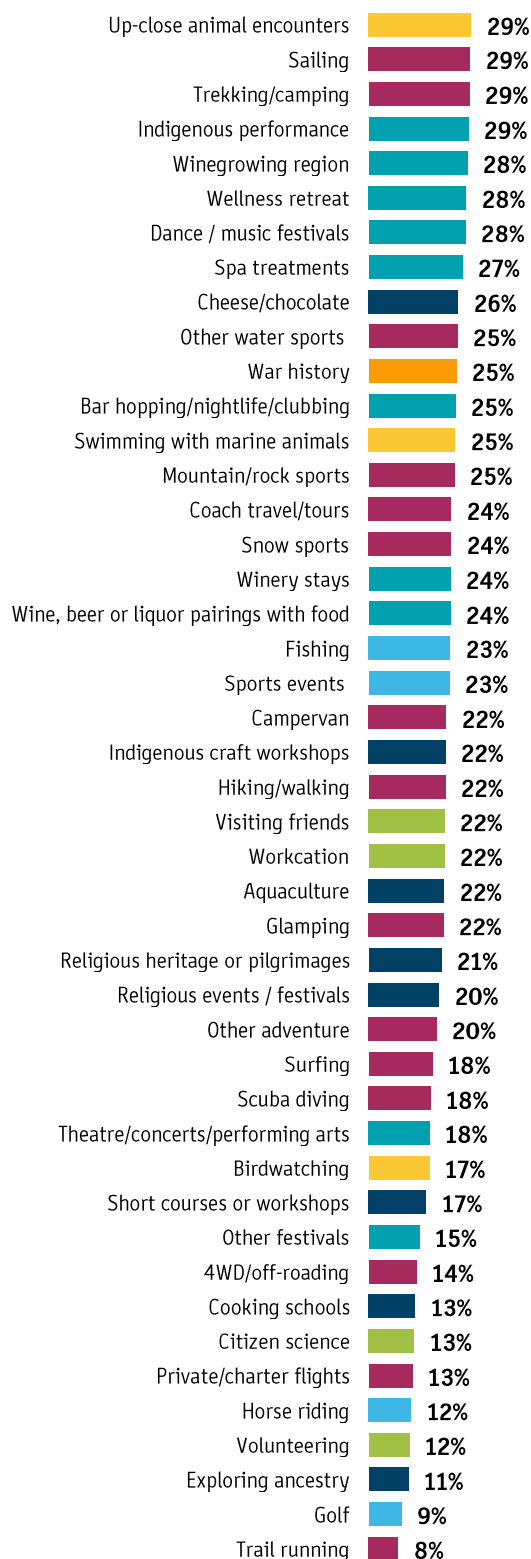


- Photography is the experience of greatest demand within the Thailand market
- Walking tours feature prominently, with more than half of Thai travellers interested
- As well as sensory experiences, natural wonders and historical sites round out the top 10

RANKED 1-44



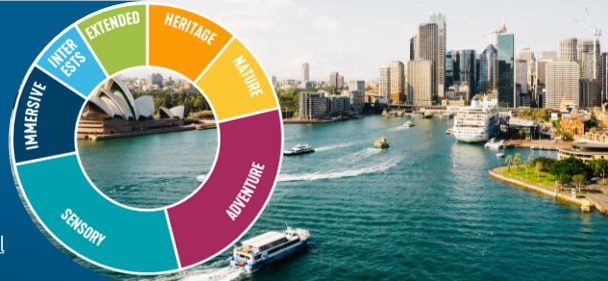
RANKED 45-89



Question: Which of these experiences would you be interested in doing on a future international vacation?
Base: Future Of Demand research 2022, Total out of region travellers, Thailand (n=828).

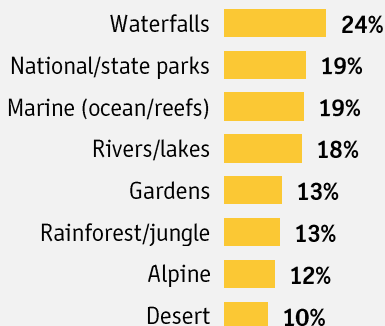
THAILAND INTEREST IN TOURISM SUB-EXPERIENCES

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

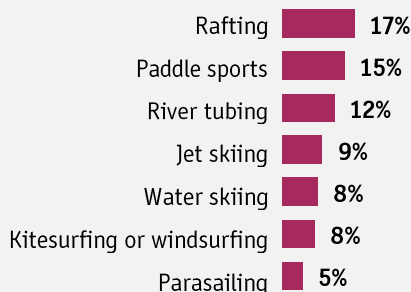


- The Thai market has strong demand for Indigenous dining, well ahead of foraging/gathering as the next highest Indigenous food experience
- Hot air balloon and scenic flights are the preferred aerial tours in this market, both attracting similar levels of interest
- Thai travellers are particularly interest in shopping for souvenirs, followed by local handicrafts and outlet/duty free

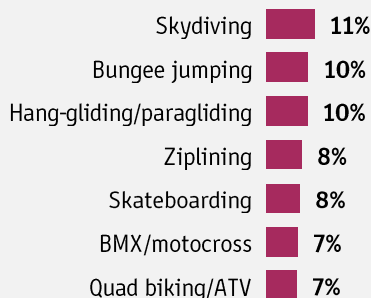
EXPLORING WILDERNESS 33%



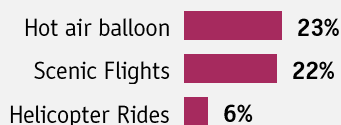
WATER SPORTS 25%



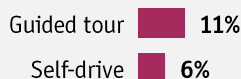
EXTREME SPORTS 20%



AERIAL TOURS/FLIGHTS 35%



4WD/OFF-ROADING 14%



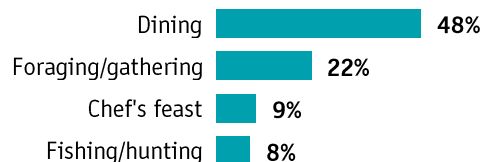
CYCLING 34%



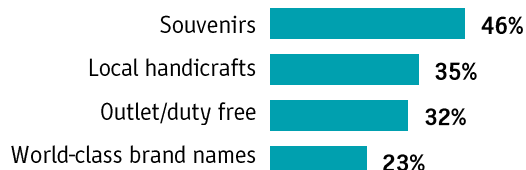
CRUISING 31%



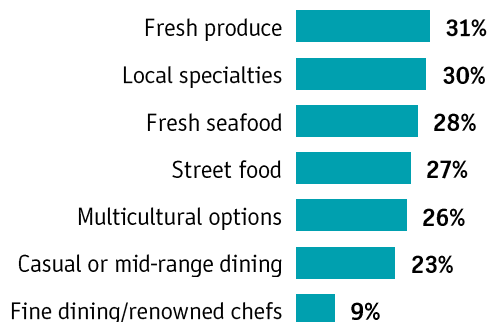
INDIGENOUS FOOD 55%



SHOPPING 61%



DINING OUT 56%



VOLUNTEERING 12%

