



TOURISM DRIVERS: SOME CONSIDERATIONS FOR SHAPING YOUR VISITOR ECONOMY

By Sasha Lennon

In the economic development space, destination management planning is 'core business'. Councils, as place-makers, have a critical role to play in supporting the vibrancy of their visitor economies to help drive positive economic development outcomes by taking a leadership role. In fact, the visitor economy is one of the few sectors that councils get directly involved in through their role in providing visitor information services, destination branding and promotion, infrastructure and service provision, land use planning, regulation and destination management.

In the post-Covid era, the expectations of travellers and the experiences they seek are changing, with global tourism trends presenting a strong case for investment in place-based approaches to destination management planning anchored around 'experience tourism'. Evolving visitor preferences and visitation trends are

influencing the prospects for tourism development and the ways in which places, as visitor destinations, can respond.

DESTINATION MANAGEMENT PLANNING AND ECONOMIC DEVELOPMENT

A destination management plan (DMP) is a statement of intent to manage a visitor destination. Typically, a DMP will articulate a vision and a plan of action to grow the visitor economy and its contribution to economic development. The visitor economy is broader than that which people normally regard as 'tourism'. It is an 'ecosystem' that covers both the demand-side, that is, people who are traveling for holidays, for education or business and those visiting friends and relatives, as well as the supply-side.

The supply-side includes the tourism operators who provide the destination's

products, services and experiences, as well as the destination's planners, promoters and enablers. This includes councils, local and regional tourism organisations, business chambers, industry associations, regional development bodies, key state and federal government agencies, education and training providers, cultural institutions and First Nations representative bodies.

A PLACE-BASED APPROACH

Typically, a destination management plan will present a clear, measurable and achievable strategy to guide the development of the local visitor economy, including enhancing and promoting visitor attractions; growing visitor numbers; extending visitors' length of stay; and maximising visitors' spend in the destination concerned.

FIGURE 1. THE ENABLERS OF A VIBRANT VISITOR ECONOMY



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Essentially, destination management planning is a form of place-making. Councils will typically take the lead in this space as part of their economic development remit, working in collaboration with their government, non-government and industry partners, to address the 'enablers of a vibrant visitor economy'.

These enablers include the destination's natural, built and social environment; its infrastructure and services (entertainment and cultural attractions, visitor accommodation, festivals and events and essential infrastructure such as transport and communications); its systems of information management and delivery (research, branding and marketing, information and wayfinding); and its governance framework, which underpins everything else.

A destination's governance framework will be most effective in guiding the sustainable growth of the region's visitor economy if served by a collaborative and coordinated approach to research, planning, decision-making, program and project delivery and accountability among local government, industry stakeholders, community groups and other levels of government.

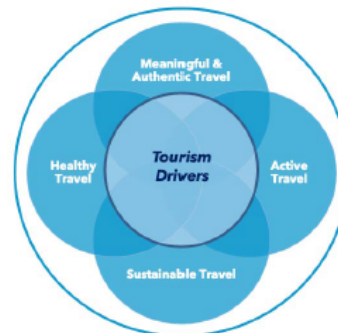
And it goes without saying that to do so effectively requires a strategic, informed and targeted approach to destination management planning, one which is cognisant not only of the profile of the local visitor economy, but importantly, broader tourism trends and influences which, if understood and leveraged, can serve to inform a DMP that will enhance the prospects for growing a vibrant visitor economy in the face of an increasingly competitive tourism landscape.

With this in mind, provided below is an overview of some key tourism trends that economic development practitioners might consider when framing their approach to destination management planning for their shire, city or region.

SOME KEY TOURISM DRIVERS IN THE 2020S

Australia's and the world's visitor economy continues to evolve, perhaps at a faster pace than ever before. A number of current tourism trends and influences worth considering and learning more about can be categorised under four overarching themes: **Meaningful & Authentic Travel**; **Sustainable Travel**; **Active Travel**; and **Healthy Travel**.

FIGURE 2. TOURISM DRIVERS: OVERARCHING THEMES



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Each of these themes is touched on below.

Meaningful & Authentic Travel

The travellers of the 2020s are seeking immersive, authentic, educational experiences that are unique to the places they visit. The desire for authentic experiences is driving demand for exploring destinations that offer something

unique. Travellers want experiences that reflect local community, culture and heritage that provide an opportunity for cultural immersion. This might include participating in local festivals and events that are unique to the places they visit, or it could include engagement with and learning about Country from First Nations people.

Food and beverage tourism offers another opportunity for unique and authentic experiences. For example, in a world dominated by multi-national corporations and global supply chains, provenance is perhaps of greater importance to today's traveller than say, 25 years ago. Many visitors are seeking to learn about the places they visit through culinary experiences and related activities such as food tours through local markets, micro-brewery tours, vineyard visits hosted by growers and farm-stays (agri-tourism). Local produce and food and drink experiences will continue to play a role in destination choice, as a central part of the travel experience, and this space will become increasingly competitive.

Sustainable Travel

Sustainable and conscious travel has been prominent for some years and will continue to gain momentum. The concept of excessive visitor arrivals known as 'over tourism' will remain topical, and destinations will need to find ways to prevent this. Consumer interest in sustainable travel will continue to evolve, moving beyond the idea of 'no net damage' to a destination towards one of 'net positive impact'.

This idea of 'regenerative tourism' is about leaving a destination better than how it was found; restoring, enhancing or renewing ecosystems, culture and community rather than merely minimising harm. Conscious travellers want to participate in conservation and cultural exchange as a defining element of their journey; they will pro-actively support local businesses and supply chains where they can and/or they will volunteer in the community where they are staying, providing their holiday with a deeper purpose.

A growing interest in volunteering, understanding and caring for the local environment and authentic engagement with communities in a destination, including First Nations, are playing a bigger

part in travel and destination choice as more and more people seek out holiday experiences with a purpose. For example, visitors increasingly want to learn from Traditional Custodians, understand cultural connections to Country and support Indigenous-led tourism ventures.

Combining the ideas of authenticity, sustainability and uniqueness, one area of travel that is growing in popularity is 'dark sky tourism'. This is a form of nature-based tourism focused on experiencing night skies free from light pollution. It appeals to travellers who seek immersion in natural environments and opportunities to observe the stars, planets, and celestial events in pristine conditions.

In New South Wales, Warrumbungle National Park is Australia's first dark sky park and the first in the southern hemisphere. Siding Springs Observatory, on the park's outskirts, is home to Australia's most important visible-light telescope and one of the few observatories in the world that can observe the whole southern-hemisphere sky. In regional Western Australia, which is home to a large number of welcoming, small country towns and low levels of light pollution, dark sky tourism is growing in popularity. According to Tourism WA, of all interstate and intrastate visitors, 89% show moderate to high interest in travelling to stargaze.

By its very nature, dark sky tourism is perfectly suited for regional areas, as the smaller the town, the darker is the night sky. Dark sky tourism also presents an opportunity to engage with First Nations culture and storytelling. For example, in Western Australia, Astrotourism WA pairs western science with local First Nations perspectives on the night sky and has even created star charts of Aboriginal constellations.

Active Travel

Recreational sports are becoming an integral part of travel plans with sport and recreational-oriented trips among the top choices of travellers globally. As one example, 'run travel', also referred to as 'runcations' or 'racecations', provides an opportunity for travellers to combine their interest in running with discovering new destinations. The opportunity this presents for destinations with the infrastructure and environment to facilitate this type of activity is huge, as running and run club participation continues to grow rapidly in popularity.

Running App Strava recorded a 59 per cent increase in running club participation globally in 2024 and according to a recent survey by travel search engine Skyscanner, 50 per cent of Australian respondents plan to engage in a running trip in 2025, with 92 per cent of those surveyed either participating or hoping to participate in an endurance event.

The opportunity to cater for this market goes well beyond road running events, with trail running and related endurance events a major growth sector. A global report on the state of trail running, prepared in collaboration with World Athletics, studied trail running race participation data from 1984 to 2022. It includes 15.6 million race results from 117 races in 127 countries and is the most extensive report on trail running participation ever conducted. It found, among other things, that trail running had grown 231% in the 10 years to 2022. While the global pandemic saw organised trail running participation numbers fall, by 2022 the numbers had begun to recover strongly.

The study also showed that trail races are getting longer. While the 5 kilometre distance once accounted for 75% of all races, by 2022 it accounted for only 45%. Nevertheless, while trail races are on average 24.63 kilometres long, trail running differs to road running in that it offers participants a greater diversity of distances and degrees of difficulty as measured by elevation. This reduces barriers to entry and presents opportunities for destinations to design and offer a variety of trail races as part of a larger event, with the potential to attract a much wider array of 'active travel' visitors.



Dark Sky in the Warrumbungles, New South Wales (source: Destination NSW)



The Noosa Ultra-Trail running event, March 2025 (source: SC Lennon & Associates)

For many, trail running is less about competition and more about mental health, escape from urban life, connection with nature, and overall wellbeing and is being used as a form of psychological reset (like any good holiday).

Of course, trail running represents just one example, with a wide variety of other growth sports and recreational activities such as road cycling and mountain bike riding offering destinations with the right environment other avenues for attracting the active traveller.

HEALTHY TRAVEL

Travel for the purpose of wellness, both spiritual and physical, to activate the mind and body, will continue to grow in popularity. While recreational tourism such as trail running or mountain biking offers an active form of 'wellness', there are many ways that travellers seek out experiences to sooth their body and their mind. The most obvious perhaps is the 'wellness travel' concept such as the yoga retreat or similar escape focussed on activities such as meditation or healing practices tied to the destination's culture and its natural surroundings.

There are other tourism trends growing in prominence which in large part, have a 'wellness' element to them. Research has shown that one of the top major Australian domestic travel trends in recent years has been people planning a working holiday. Known as 'workcations', these trips combine work and vacation and represent a hybrid form of tourism. The 'work-from-anywhere' mentality that was boosted by the impacts of Covid, with the necessity to work remotely for many industries, and the increased flexibility that employees gained during the pandemic, is likely to stay. CEDA reports that in 2024, over a third of Australians (36%) still worked from home regularly, sustaining much of the increase since before the pandemic.

Research by International Workplace Group found that 77% of Australian hybrid workers considered taking a workcation in 2024, if their employer supported it. While Sydney remains the top choice for workcations, there is an opportunity for regional centres, particularly those well connected by air, to tap into this phenomenon. Many people are either adding an extra day to a business trip to explore the area they are visiting, or they just choose to work from another location for a few days or even weeks.

Natural environments are especially popular for workcations, and some working travellers identified benefits such as boosting their mental health through switching their working environment and getting out of the 9-to-5 grind. For many regional locations, workcations could be an interesting trend to attract visitors and / or extend their length of stay.

Other trends emerging include 'calmcations' where travellers seek opportunities to rest and restore through experiences that create a sense of tranquility. Off-the-grid eco-escapes present one means of fulfilling this desire of travellers who are looking for peace and quiet and an opportunity to re-connect with nature. Another is the concept of the 'quiet escape'.

For example, in Europe Havia Cruises offers tours to nature-based locations along the Norwegian coast where the objective is to immerse the traveller in an environment of pleasant, natural sounds that are healing for the mind and body. The idea is to take a break from the ill-effects of everyday urban noise pollution and re-energise on the principle that "sounds from natural environments have a profound positive impact on our mental health and well-being.

The quality of the sound, rather than its volume, plays a very important role”.

These prominent traveller trends can be used to inform councils and their partners when preparing their new destination management plan, one that will be responsive to prominent tourism trends and influences. There are other considerations too and these refer to our changing demographics and associated traveller needs. For example, as the baby boomer generation ages ‘accessible tourism’ is in increasingly high demand. This fast-growing sector accounted for around 17 per cent of total tourism revenue in Australia in 2023/24. An increasing number of people aged 65 and over who are also keen travellers may have accessibility needs.

The above are just a few considerations that provide food for thought and the basis of further exploration through more in-depth research and analysis. They should be considered in the context of local circumstances and visitor economy trends and prospects as they apply to the destination concerned. With this in mind, those places which understand and respond to growing consumer desires to connect authentically with local culture,

community and the built and natural environments, are the destinations that will prosper in tomorrow’s economy.

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