

INDONESIA | MARKET PROFILE 2025

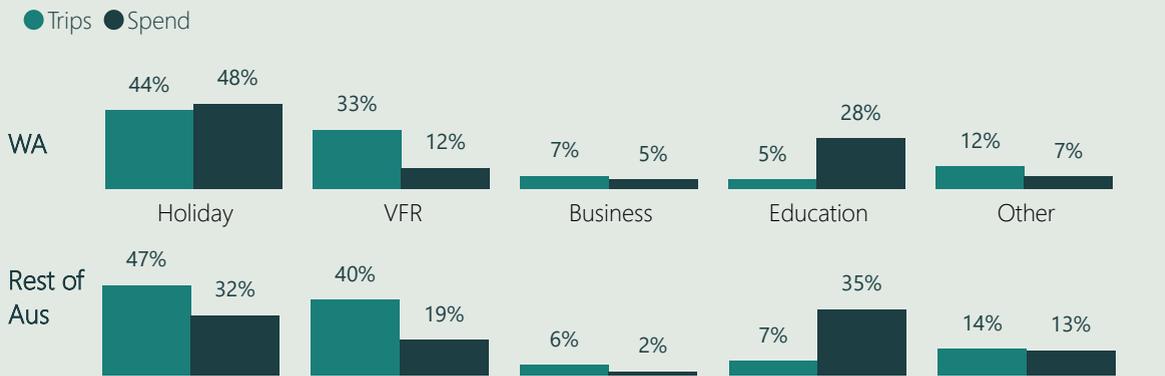
MARKET OVERVIEW

Leisure Visitation to WA (as compared to an average for other states/territories) ¹

Rest of Aus is an average of all other states excluding WA



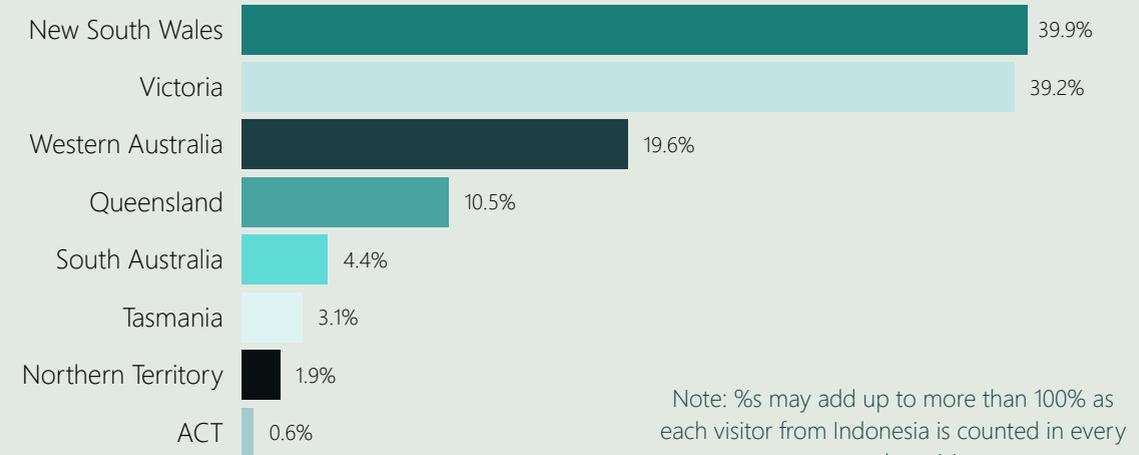
Total Trips and Spend by Purpose ¹



Leisure Visitation and Spend in WA ²

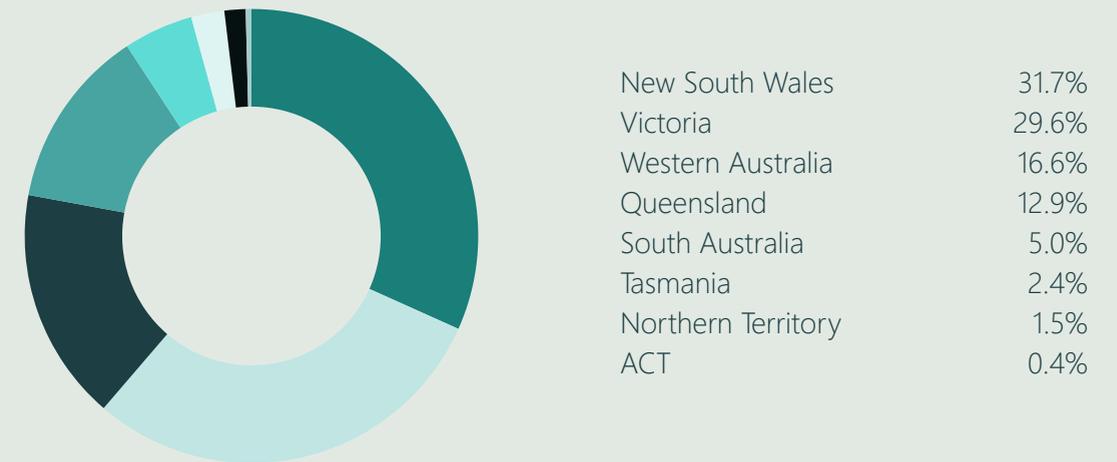


Market Share of Leisure Trips to Australia ¹



Note: %s may add up to more than 100% as each visitor from Indonesia is counted in every state they visit.

Market Share of Leisure Trip Spend in Australia ¹



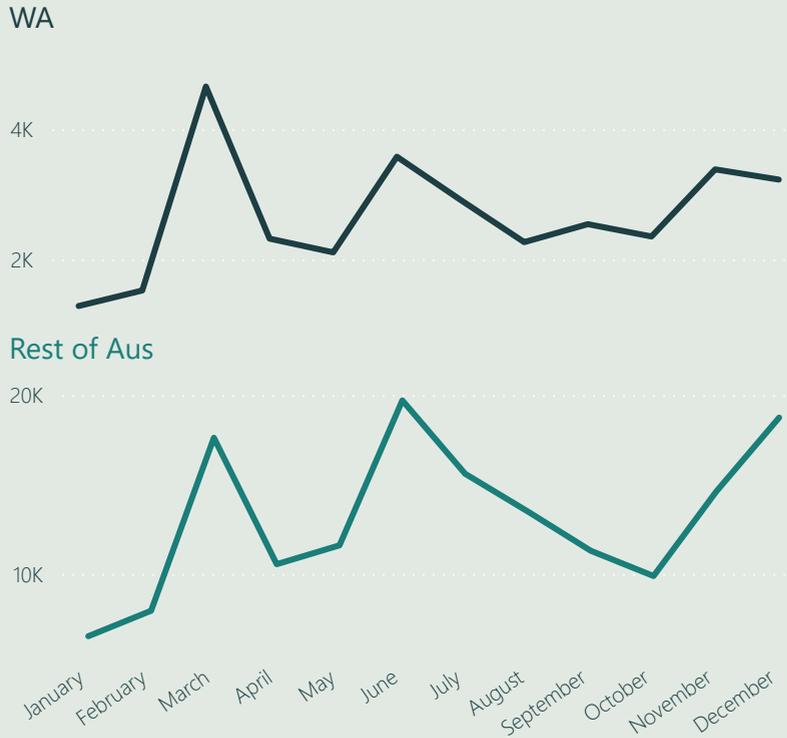
Explanatory note: 16.6% of all Indonesian leisure trip spend in Australia was spent in WA.

● WA ● NSW ● VIC ● QLD ● SA ● TAS ● NT ● ACT

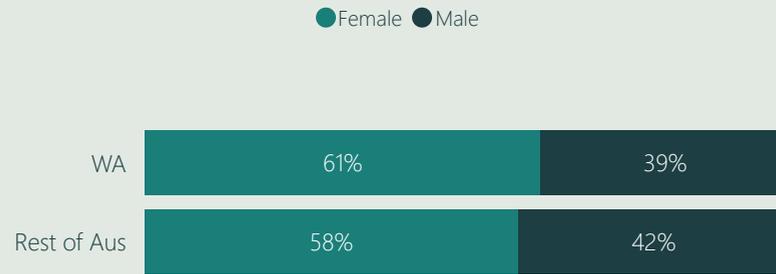
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LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

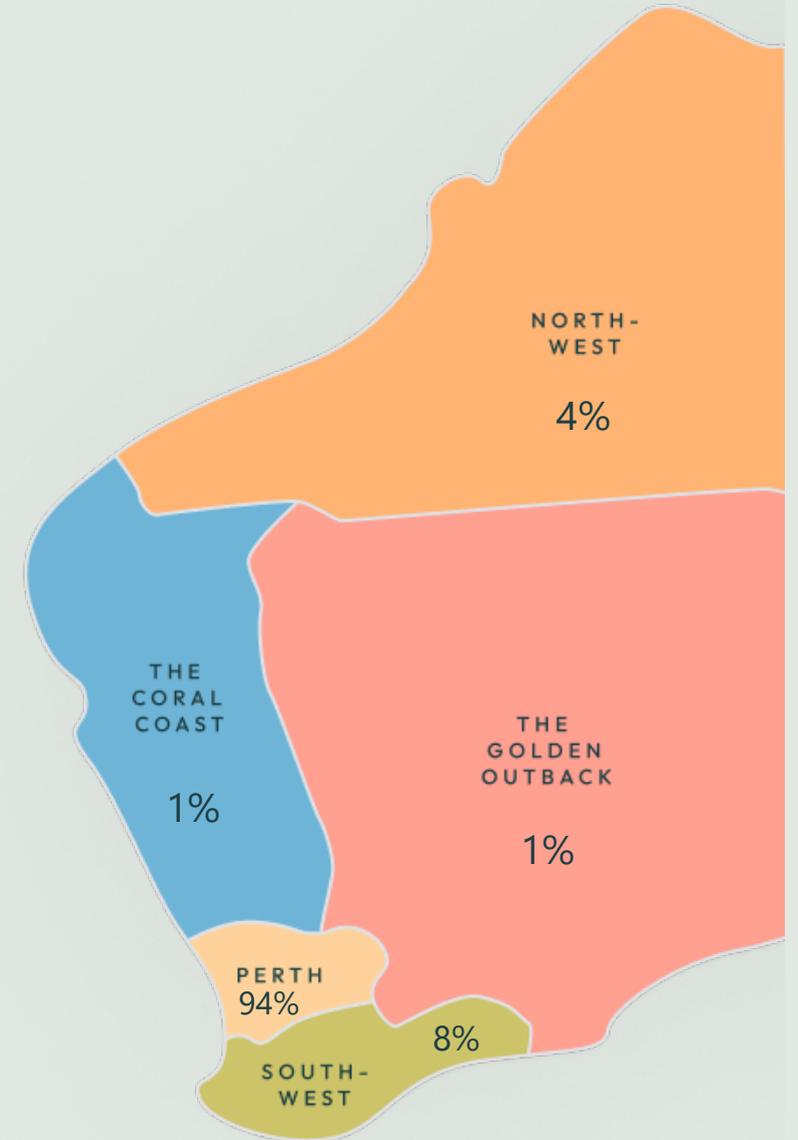
Seasonality - Short-term Leisure Visitor Arrivals ⁴



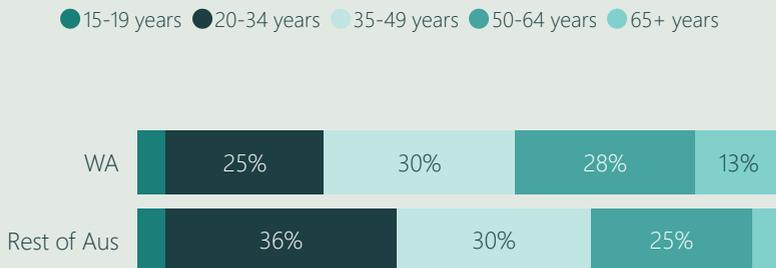
Gender ³



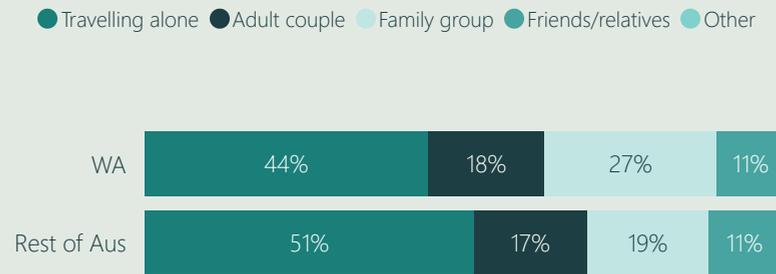
Regional Dispersal ³



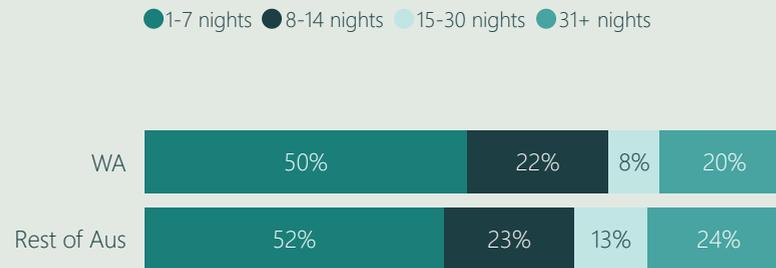
Age ³



Travel Party ³



Average Length of Stay in State ³



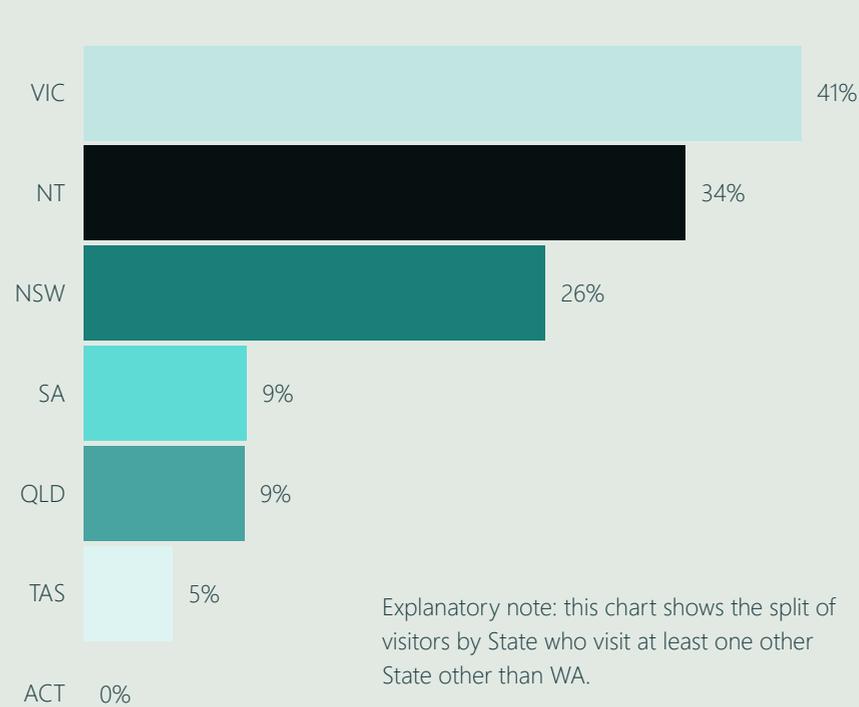
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LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

Top 10 Activities for Leisure Visitors to WA ³*

	WA	Rest of Aus
	%	%
① Eat out / dine at a restaurant and/or cafe	95%	92%
② Go shopping for pleasure	87%	86%
③ Sightseeing/looking around	82%	81%
④ Go to the beach	69%	59%
⑤ Visit national parks / state parks	68%	44%
⑥ Visit botanical or other public gardens	66%	47%
⑦ Go to markets	61%	61%
⑧ Visit museums or art galleries	29%	44%
⑨ Visit buildings or sites of historical interest	27%	32%
⑩ Visit wildlife parks / zoos / aquariums	24%	30%

Other States Visited ³



Group Tour v Free Independent Travellers (FIT) ³

67% of Indonesian leisure visitors to WA are free independent travellers. 90% of Indonesian leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

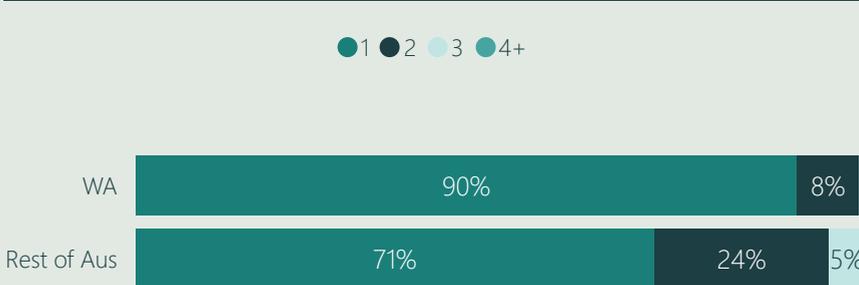
Repeat Visitors ³

82% of Indonesian leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 69%.

Top 3 Accommodation Choices for Leisure Visitors to WA ³

	WA	Rest of Aus
	%	%
① Hotel/resort/motel or motor Inn	45%	51%
② Friends or relatives property	41%	44%
③ Other commercial accommodation	15%	18%

Number of States Visited ³



Travel Packages ³

1% of Indonesian leisure visitors to WA arrived on a travel package and the percentage this type of visitor makes up in the rest of Australia is 5%.

*Note: Activity may have taken in place in WA or elsewhere in Australia during the trip.

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IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

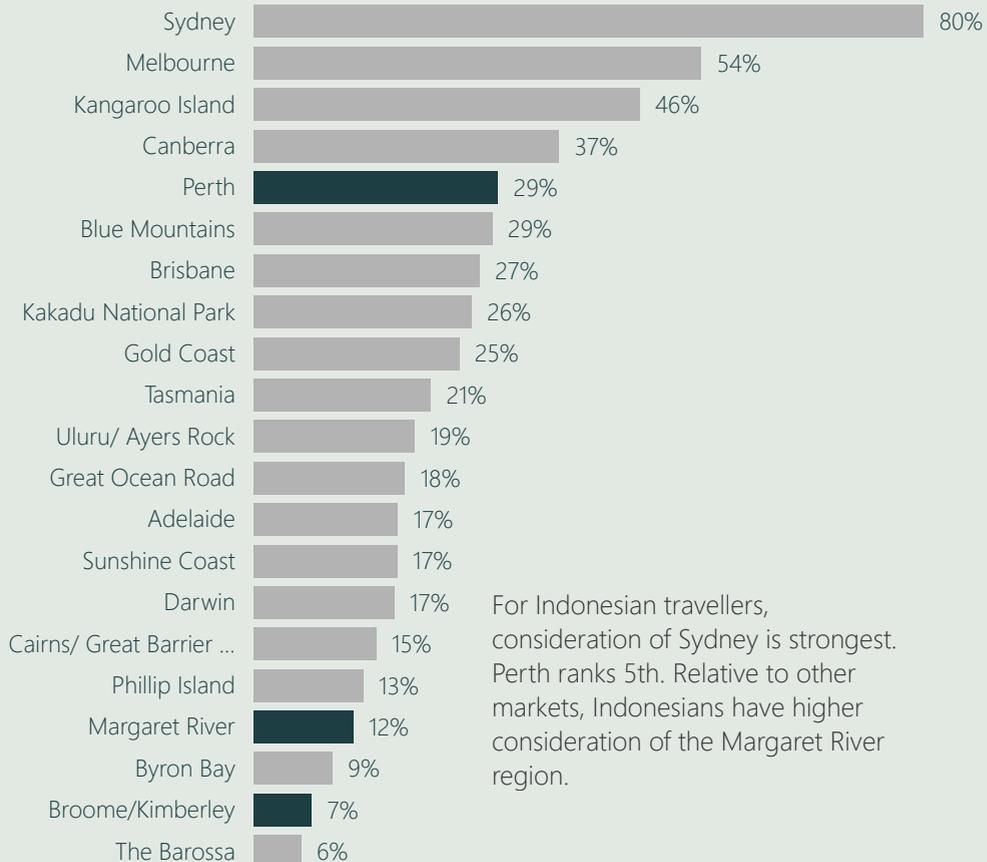
Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

Consideration of Australian Destinations ⁵

(those considering a trip to Australia in the next 4 years)



For Indonesian travellers, consideration of Sydney is strongest. Perth ranks 5th. Relative to other markets, Indonesians have higher consideration of the Margaret River region.

Which factors are most important when choosing a destination ⁵

- ① A family friendly destination
- ② A safe and secure destination
- ③ Value for money
- ④ Easy to get to (time & effort)
- ⑤ Easy to obtain an entry visa
- ⑥ Good accommodation options

Indonesian travellers seek destinations that are familyfriendly, and place more emphasis on this than the average traveller. Safety is also important, followed by value for money.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	54%	38%	15%	20%	11%	10%
A vibrant city lifestyle	64%	49%	19%	27%	7%	9%
Beautiful natural environments	23%	19%	10%	13%	20%	10%
Different and interesting local wildlife	16%	12%	9%	9%	8%	10%
Good food, wine/beverages, local cuisine and produce	48%	37%	20%	21%	9%	11%
Interesting events and festivals	50%	38%	16%	20%	10%	11%
Value for money	54%	40%	17%	22%	11%	10%

Indonesian travellers have stronger associations with Margaret River and Broome/Kimberley than most other international markets. Perth's strongest association is with vibrant city lifestyle, but is outperformed by Sydney and Melbourne.

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DEFINITIONS & SOURCES

Definitions

Leisure: comprises both holiday visitors and those visiting friends and relatives (VFR).

Sources

1. Tourism Research Australia – International Visitor Survey, YE Dec 25
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24/25
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 24/25
4. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 25
5. Tourism Australia – Consumer Demand Project, October - December 2025.

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