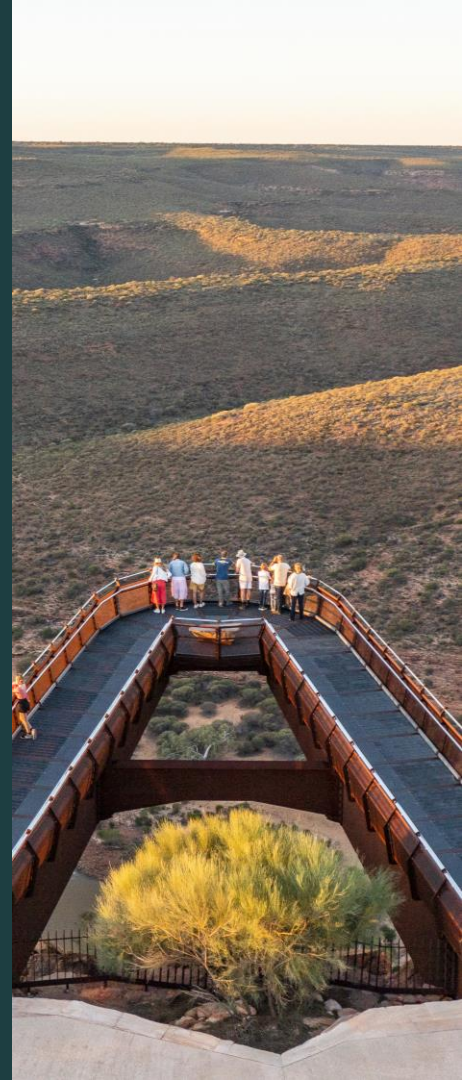


# Visitor Experience and Expectations Research (VEER) 2024-25

August 2025

# OVERVIEW

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# Background and Methodology

## Objective

The research objective is to better understand visitor experiences in Western Australia. The survey measured visitors' experiences, expectations and general thoughts of WA and their holiday.

## Sample

The survey involved 401 face to face intercept interviews with international and interstate visitors on holiday in WA for 2 or more nights, and WA residents who were currently on a WA short break/holiday or who had holidayed in WA in the past 6 weeks.

## Timeline

Fieldwork was conducted by Thinkfield in 2024-25 in three waves over the course of the year from November 2024 to May 2025.

## Travel restrictions

Due to travel restrictions in 2020 and 2021 it was not possible to survey interstate and international visitors so those years have been excluded from historical comparisons.

## Comparison

*Significant difference testing* has been included throughout this report. The green circles/upward pointing arrows represent a significantly higher score and the red circles /downward pointing arrows represent a significantly lower score at 95% confidence level.

Significant differences are shown between years and for source markets vs. total sample, as relevant.



## Sample Structure

Interview Location	Total	Intrastate	Interstate	International
Kings Park	66	14	20	32
City of Perth	62	18	17	27
Perth Visitor Centre	3	1	1	1
Fremantle	108	28	35	45
Mandurah	10	8	2	
Elizabeth Quay	37	8	17	12
Other Perth	115	51	22	42
Total	401	128	114	159



# Executive Summary

# Summary of Key Findings

- Visitors continue to be very satisfied with their holiday in Western Australia (WA). In 2024-25 nearly all (99%) rated their experience positively, with more than half (56%) describing their trip as 'excellent'.
- Expectations of nearly all visitors (99%) were therefore easily met in 2024-25, and three in five (63%) said their WA holiday surpassed their expectations.
- WA's natural assets, including its beaches and coastline, unique natural sights and pristine natural environments, as well as good food and wine are the main reason visitors choose to holiday in Western Australia. These also continue to be the main reason visitors would recommend WA as a holiday destination to their friends/family.
- More than nine in ten visitors were either fairly or very satisfied with the following aspects of their holiday: accommodation, food & drinks, natural attractions, manmade attractions, friendliness of locals, customer service, personal safety & security and variety of things to see and do. Despite being the lowest scoring aspects, more than three quarters of visitors were either fairly or very satisfied with public transport and nightlife.
- Advocacy to recommend WA as a holiday destination is high, with a strong Net Promoter Score of 84, up 9 points from 2023-24.
- In 2024-25, 60% of visitors rated their holiday as 'extremely good' or 'good' value for money. This is a decrease of -2 percentage points since 2023-24 but still a strong result compared to earlier years. One in twenty visitors (5%) said their WA holiday was poor value for money, with cost of accommodation and/or food and drinks most commonly cited as the reason.
- 81% of visitors had a particularly memorable experience in WA. A natural attraction was the most common reason.
- Aboriginal tourism in Western Australia continues to be of great interest to visitors, with four in five visitors (82%) saying they would be interested in experiencing Aboriginal tourism in Western Australia if it were easily accessible. However, participation levels remain relatively low, with just quarter (24%) of visitors actually having an Aboriginal tourism experience in 2024-25. This demonstrates that raising awareness and supply of aboriginal tourism experiences is critical to meet visitor demand.



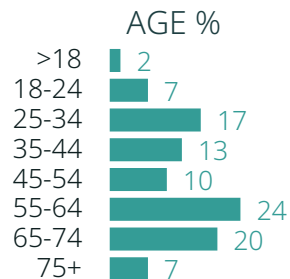


# Visitation

# Total Sample

Visitors to Western Australia surveyed in 2024-25 consisted of mainly couples, solo travellers and family groups. Gender split was almost even.

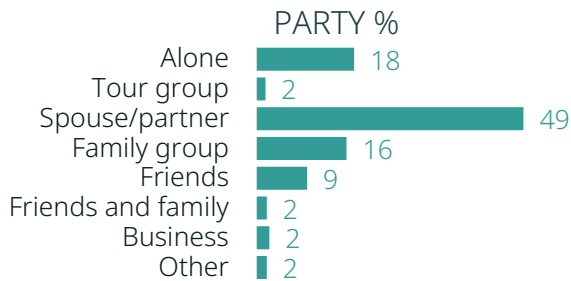
For details of the split by market, see appendix pages 39-41.



*Age proportions have been controlled via quotas and do not represent accurate visitor breakdowns.*



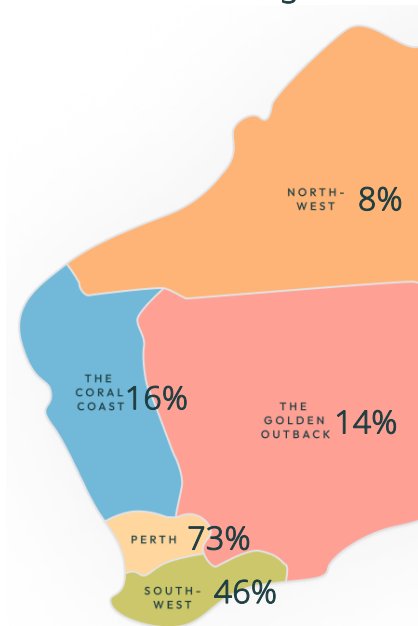
*Market proportions have been controlled via quotas and do not represent accurate visitor breakdowns.*



# Trip Details

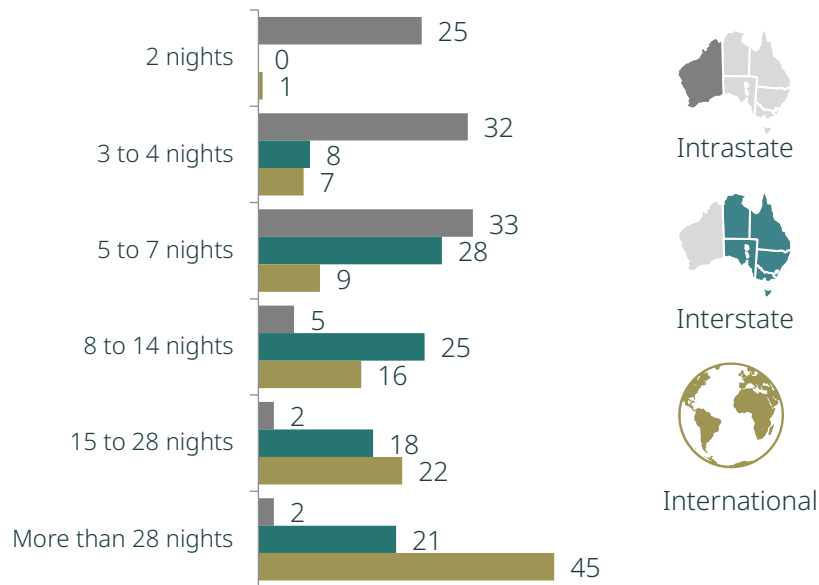
Other than Perth, the South West was the most visited region in 2024-25, with 46% having visited the region. The length of stay among the visitor source markets varies; intrastate visitors were most likely to have taken breaks of up to one week (90%) while the majority of international visitors (83%) and two thirds (64%) of interstate visitors were visiting WA for more than a week.

## 2024-25 Region Visited



	Intrastate	Interstate	International
DP	21%	97%	96%
ASW	63%	38%	38%
ACC	13%	17%	17%
AGO	4%	25%	15%
ANW	8%	6%	9%

## 2024-25 Length of visit – by visitor type %



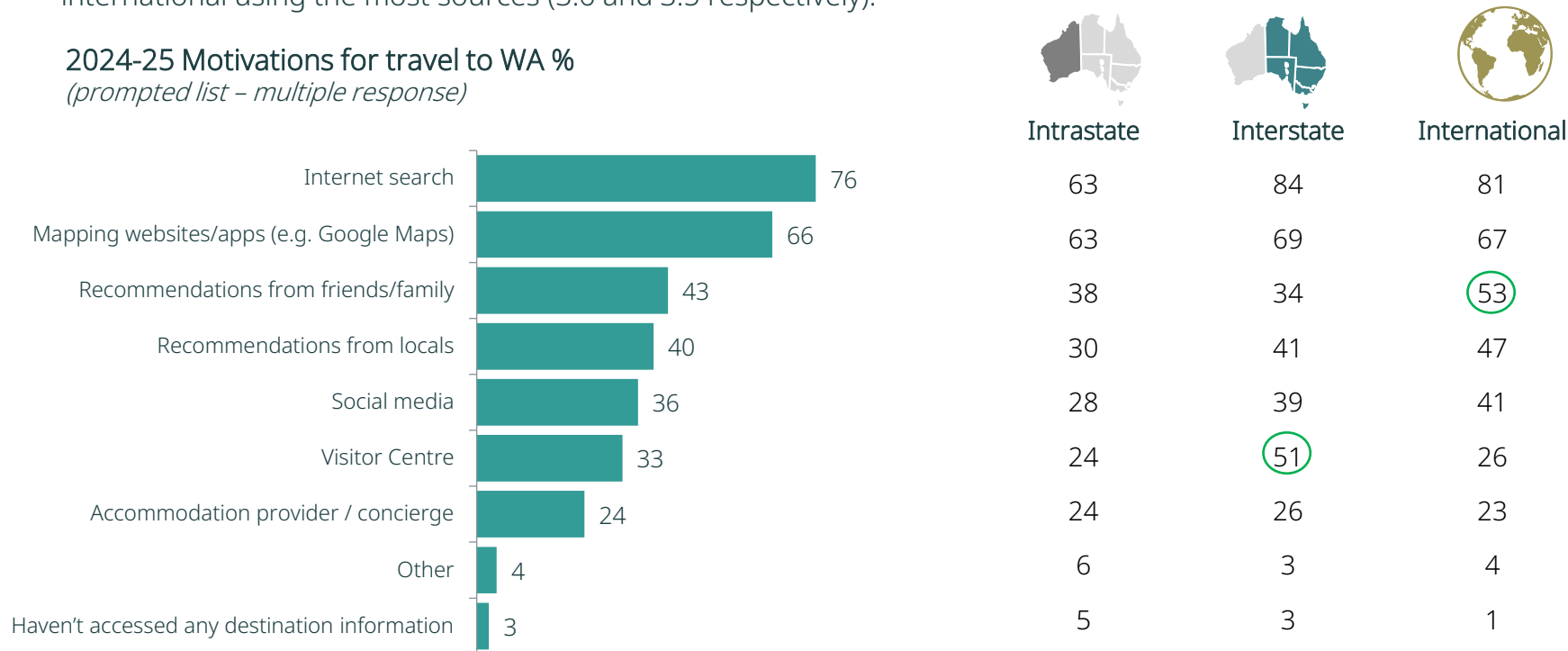


# Information Sources

Almost all (97%) of holiday-makers to WA access destination information (such as things to do, places to eat) during their trip. An internet search is the most common information source, used by 76% of visitors, followed by mapping websites (eg google maps). On average, visitors access information from 3.3 different sources, with interstate and international using the most sources (3.6 and 3.5 respectively).

## 2024-25 Motivations for travel to WA %

(prompted list – multiple response)



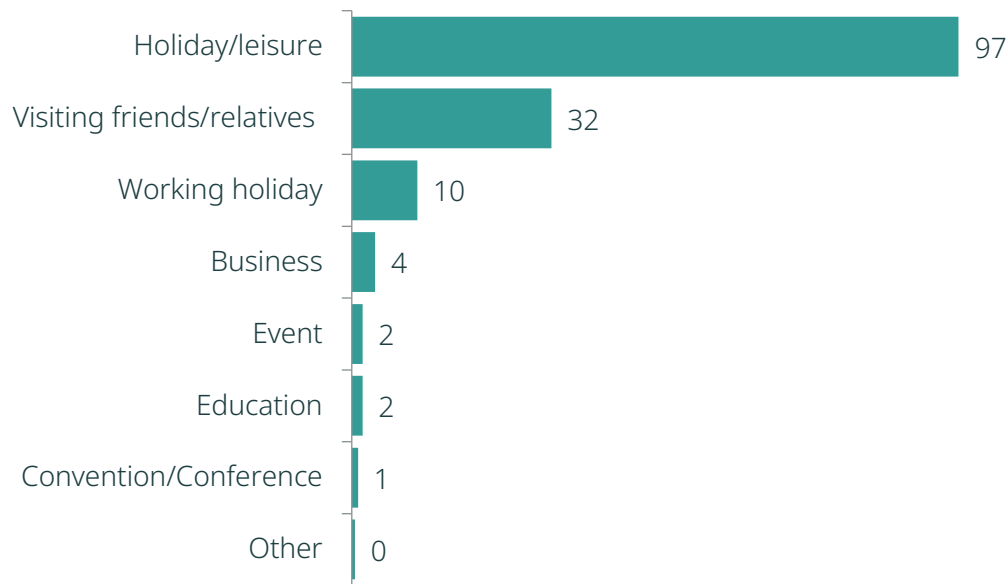


Motivation

# Purpose of Visit

To qualify for the survey, all visitors had to be visiting WA for a holiday (or a working holiday, for international visitors). Three in ten (29%) of interstate visitors and half (49%) of international visitors were also visiting friends and relatives living in Western Australia.

## 2024-25 Purpose of Visit %



Intrastate



Interstate



International

96

97

97

13

29

49

5

4

19

3

6

3

4

4

4

3

0

2

0

4

0

1

0

1

# Motivations for Travel to WA

The most important factors influencing the decision to travel to/in Western Australia among all visitor types were nature-based; the beaches and coastal scenery, unique natural sights, and pristine natural environments all in the top 5. Visiting friends/relatives is also a top factor for out-of-state visitors, as is visiting somewhere new / a bucket list destination.

## 2024-25 Motivations for travel to WA %

(prompted list – select up to 3)



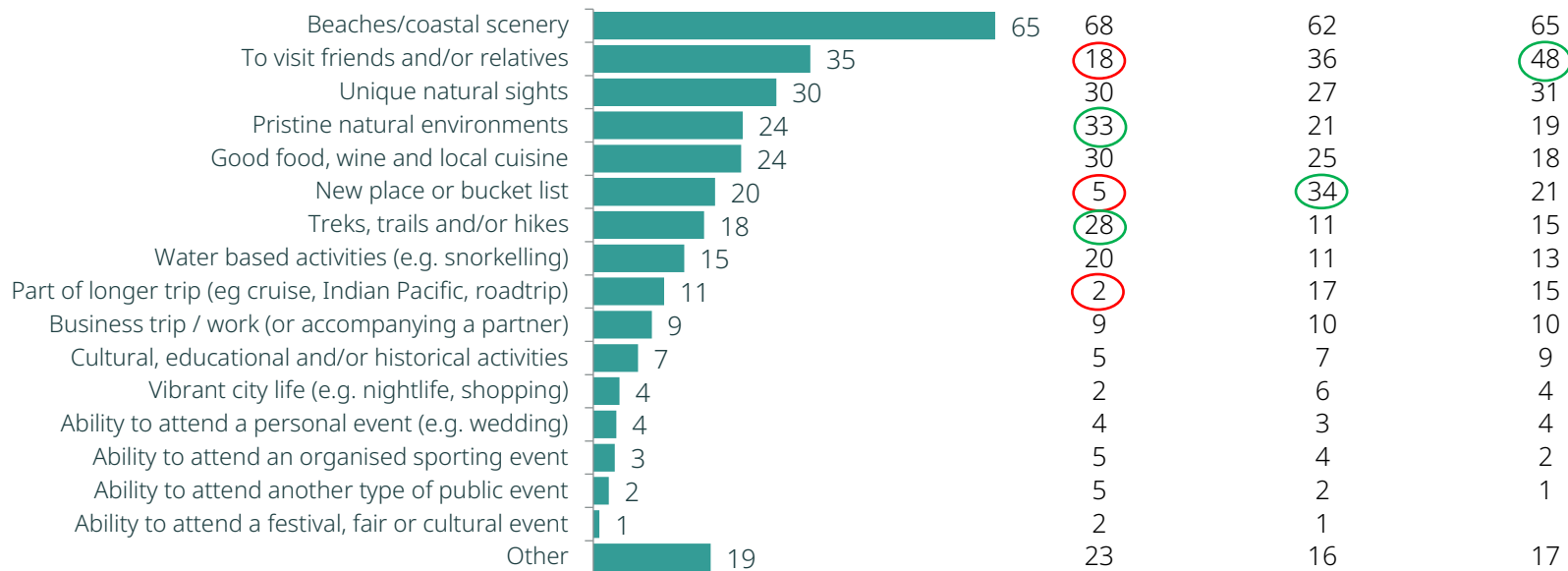
Intrastate



Interstate



International



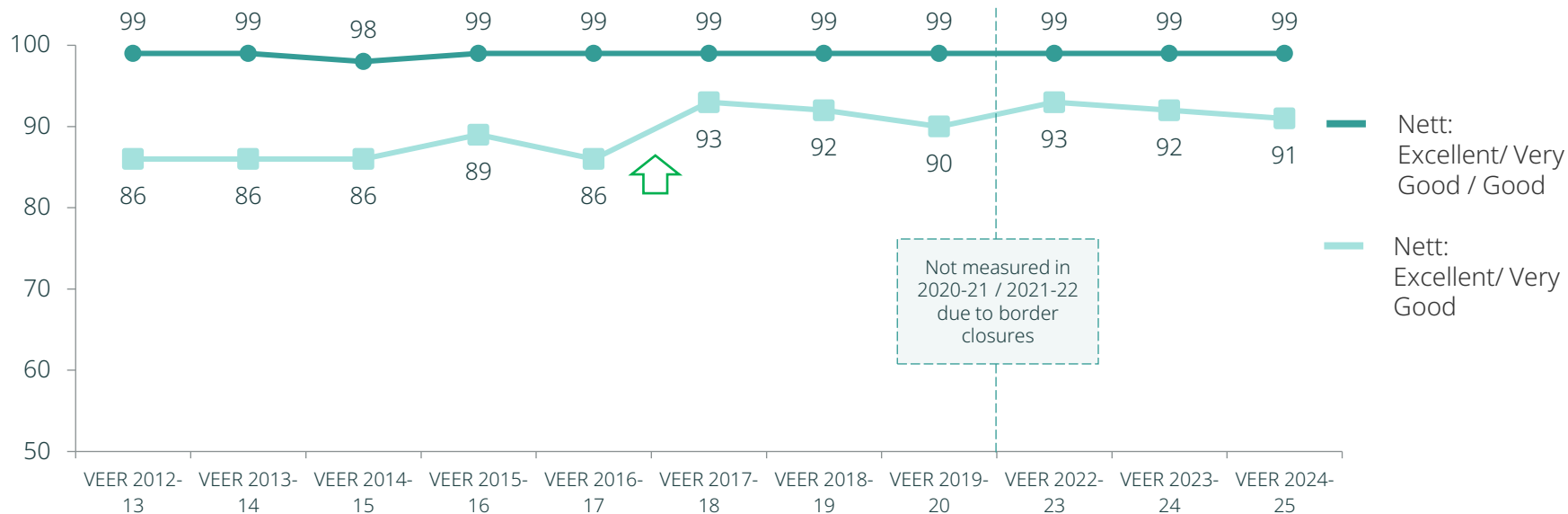


# Experience and Expectations

# Rating of Overall Experience

Visitors to Western Australia continue to rate their holiday experience very highly. In 2024-25, 99% described their experience as 'excellent', 'very good', or 'good'.

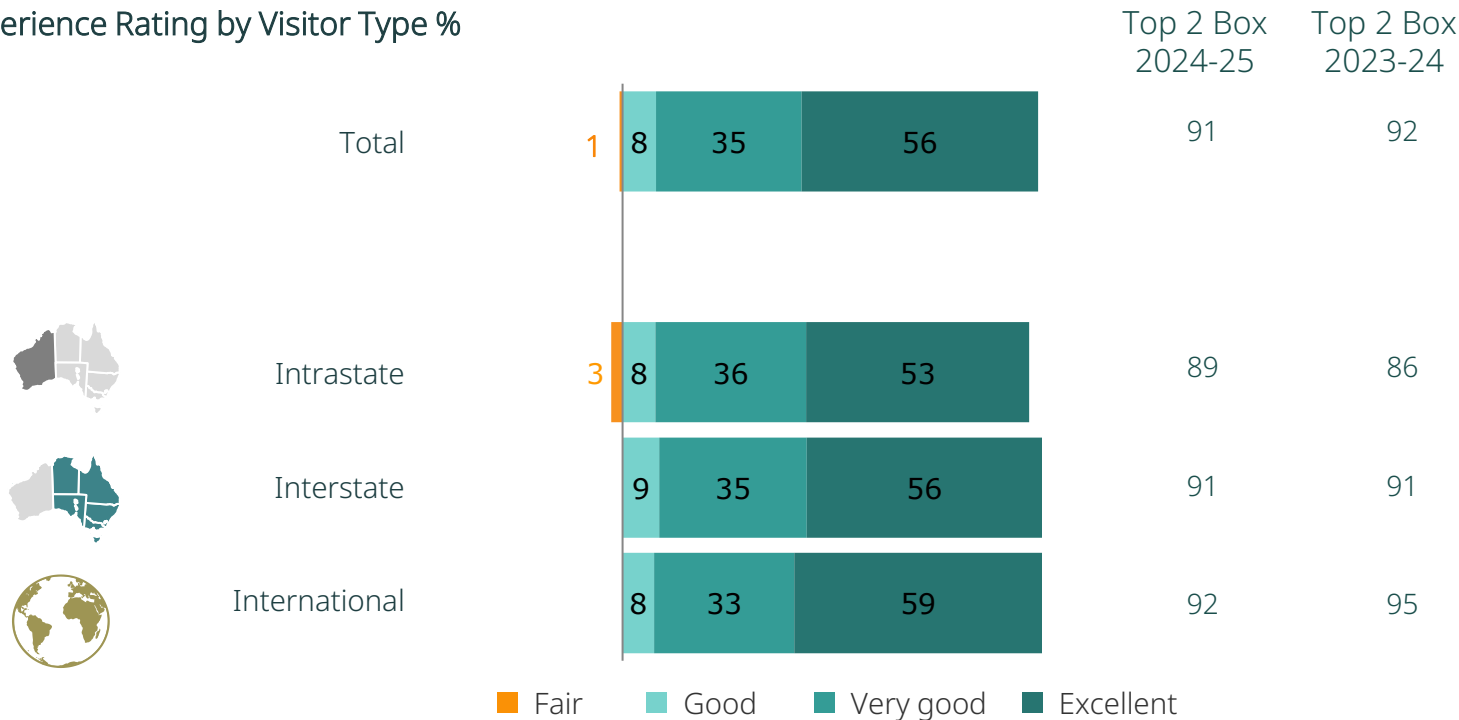
## Overall experience rating by year %



# Experience by Source Market

In 2024-25 there was little differentiation in experience among the source markets, with nine in ten intrastate, interstate, and international visitors rating their holiday in WA as 'excellent' or 'very good'.

## 2024-25 Experience Rating by Visitor Type %

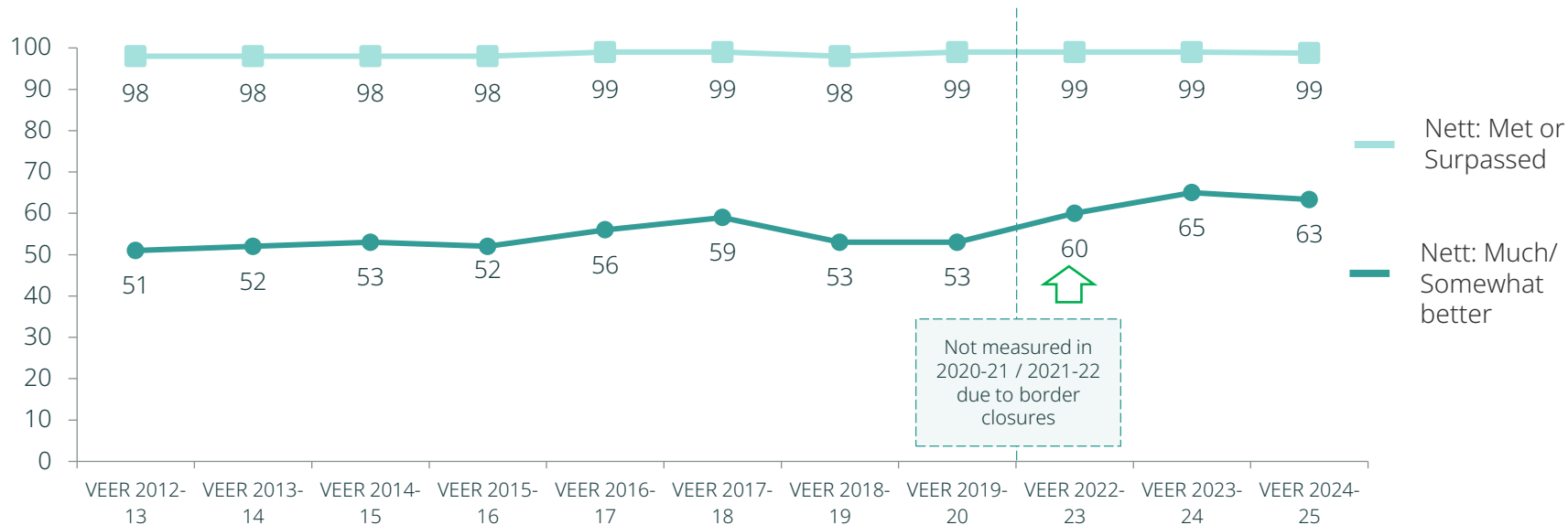




# Expectations

Western Australian holidays surpassed the expectations of more than three in five of the State's visitors, with 63% stating that their holiday in WA was somewhat or much better than they had expected.

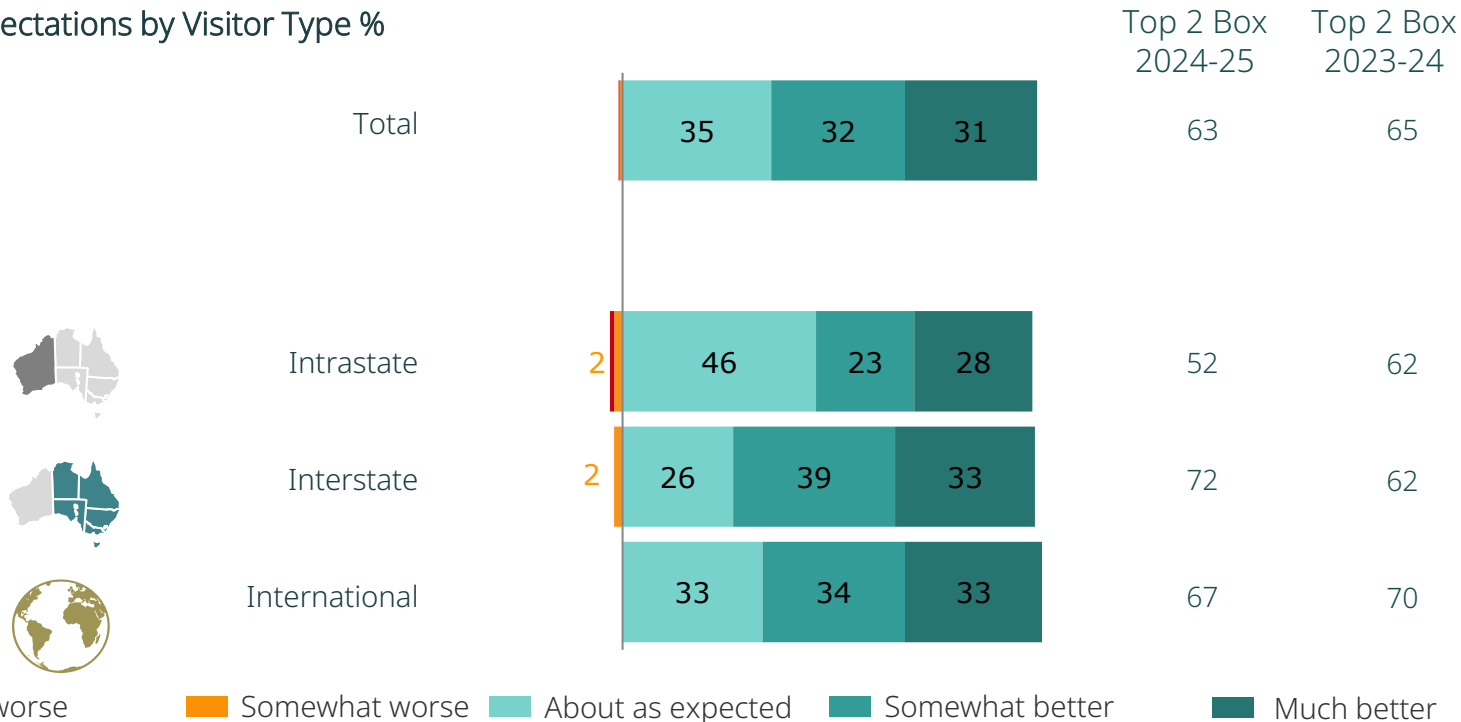
## Overall experience rating by year %



# Expectations by Source Market

Interstate visitors were the most likely to say that their holiday in WA was better than they had expected. In 2024-25, 72% of interstate visitors claimed their experience was somewhat or much better than expected, an increase of 10% points from 2023-24.

## 2024-25 Expectations by Visitor Type %





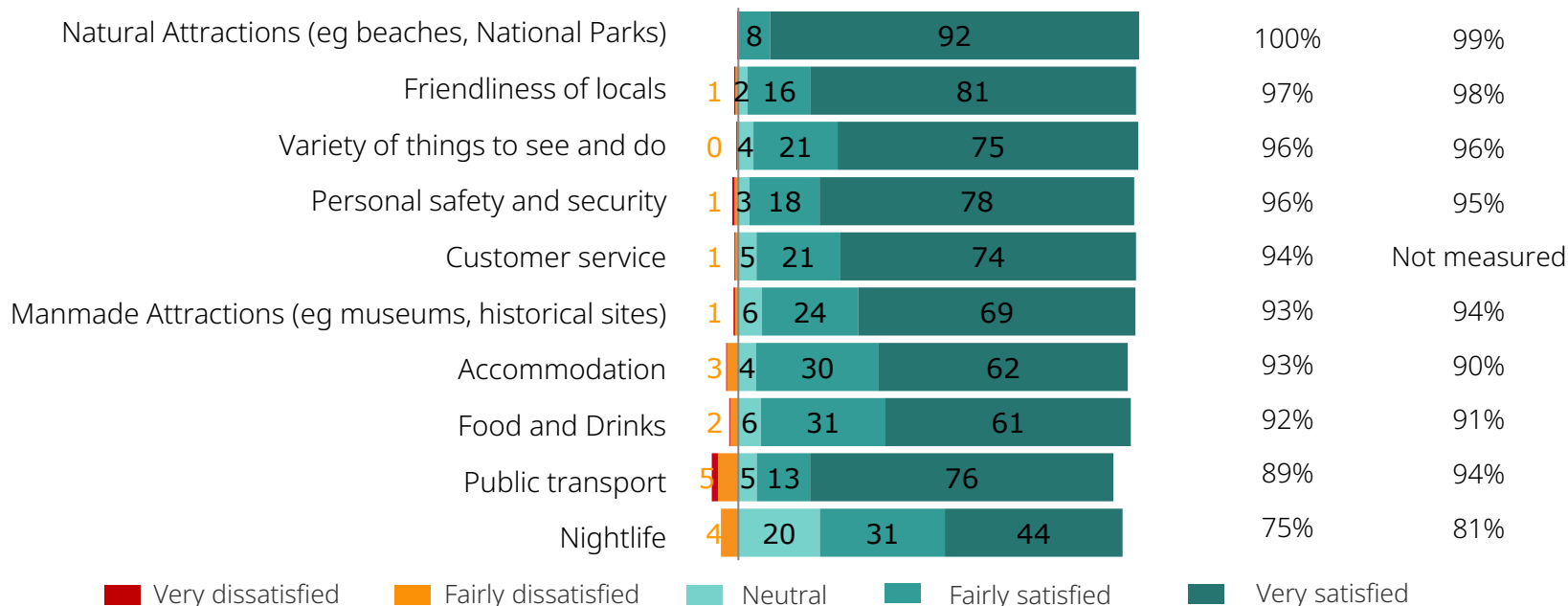
Satisfaction  
and Value for  
Money

# Satisfaction

Visitors were very satisfied with all aspects of their trip. Highest satisfaction ratings were given for Western Australia's natural attractions with 100% satisfaction. Satisfaction of each aspect by source market can be found in the appendix pages 42-44.

## 2024-25 Satisfaction of aspects of holiday %

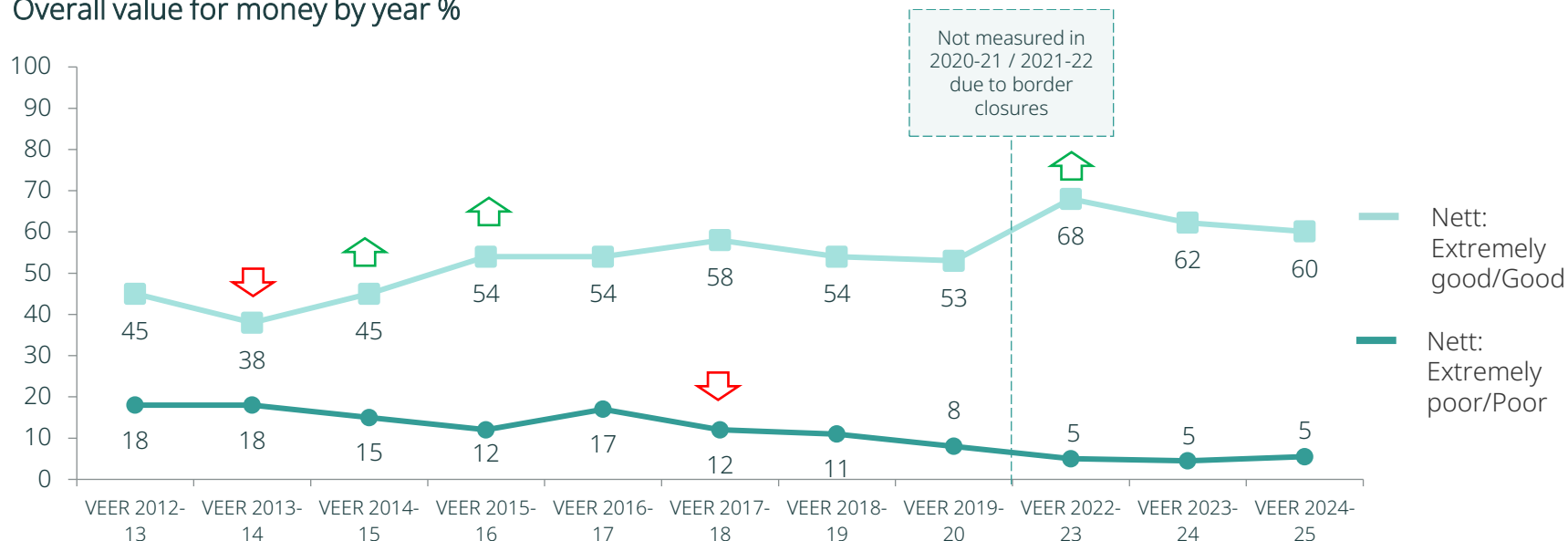
Top 2 Box  
2024-25      Top 2 Box  
2022-23



# Value for Money

Three in five (60%) of all visitors surveyed in 2024-25 perceived their holiday to be 'good' or 'extremely good' value for money. Whilst below the record high of 2022-23, this is still a significant improvement on previous years. The number of visitors who perceive WA to be 'poor' or 'extremely poor' value for money remains very low (just 5% in 2024-25).

## Overall value for money by year %



SOURCE: Q7. Now using this scale, could you please rate the overall value for money of your holiday in Western Australia?

# Value for Money by Source Market

In 2024-25 there was little differentiation in the rating of value for money among the source markets, with three in five intrastate, interstate, and international visitors rating their holiday in WA as 'excellent' or 'very good' value for money. However, this metric dropped for intrastate visitors with only 60% rating their holiday as value for money, down from 66% last year.

## 2024-25 Value for Money by Visitor Type %

Top 2 Box  
2024-25

Top 2 Box  
2023-24

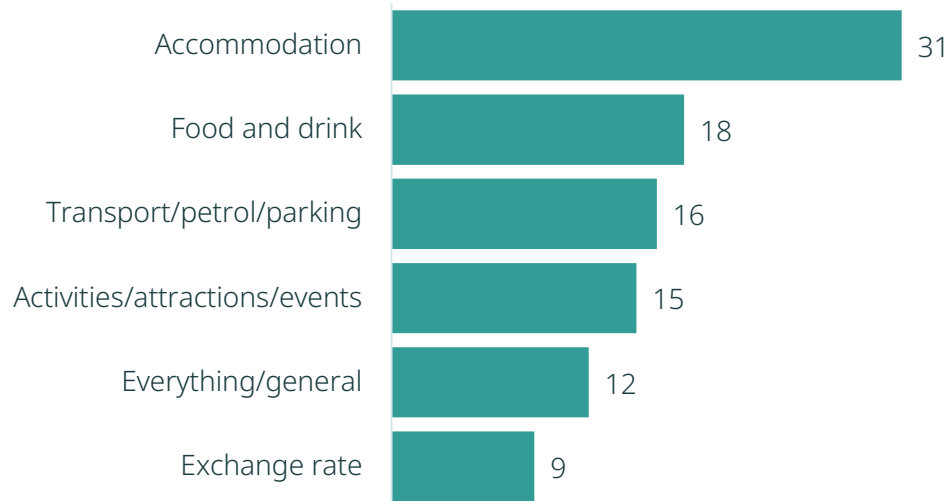


# Reason for good value for money

Amongst the 60% of visitors who rated their holiday as 'good' or 'extremely good' value for money, accommodation was the most common reason cited, followed by food & drinks and transport/petrol/parking.

## 2024-25 Main element of holiday considered good value for money %

(Open ended question, coded responses)



Mentions 5% or more shown.



*"The accommodation was good, you get a high standard with good space"*

*"Food and Wine is very upmarket here and well priced"*

*"Caught a Trans WA bus to Esperance that was very reasonably priced and I was happy with accommodation"*

*"Everything is well priced"*

*"It seemed expensive but after trip I thought it was worth every penny"*

*"Converted to euro you feel like your money goes further"*

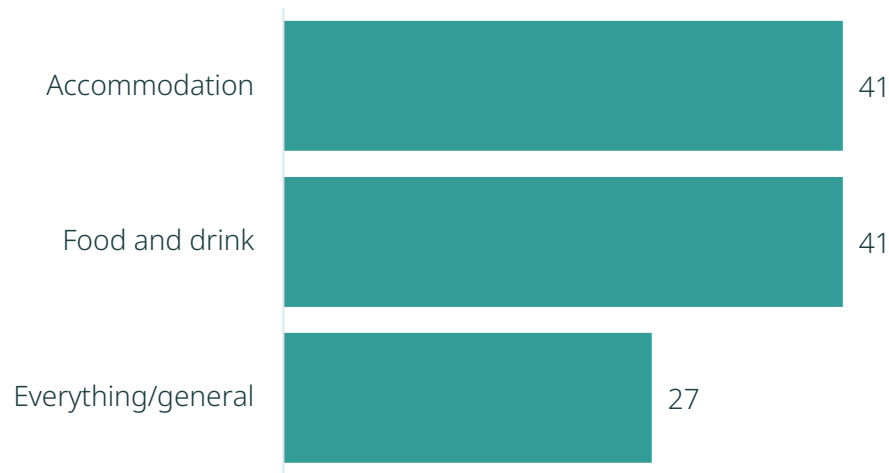


# Reason for poor value for money

Amongst the one in twenty (5%) visitors who said their holiday in WA was poor value for money, the expense of accommodation and eating out and/or food and drinks were most commonly cited. (Note: small sample sizes; results are indicative only)

## 2024-25 Main element of holiday considered poor value for money %

*(Open ended question, coded responses)*



*Mentions 5% or more shown.*



*"Alcohol and food are very expensive"*

*"Hotels are too expensive. We would come more often if it was cheaper"*

*"Backpacker accommodation expensive and not much available"*

*"The accommodation was expensive but very tired and poorly maintained"*

*"Things in WA are more expensive like Fuel, National Park entry fees and campsites"*



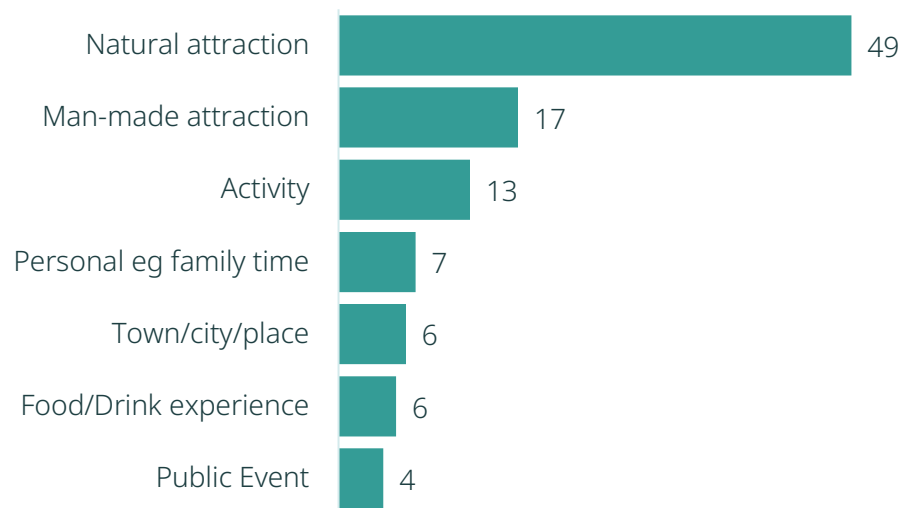
Memorable  
Experience

# Memorable experience

81% of visitors claimed they had a particularly memorable experience in WA. A natural attraction was the most common reason, cited by almost half. Man-made attractions and specific activities (eg snorkelling or tours) followed.

## 2024-25 Memorable Experience %

(Open ended question, coded responses)



Mentions 4% or more shown.



*"Bluff Knoll in the Stirling Ranges/ the scenery and the hike as we climbed the mountain"*

*"Busselton jetty area is amazing and eating at origin markets"*

*"A private tour of the Dampier peninsula by an aboriginal elder"*

*"I did my first iron man event"*

*"Spending time with my family and riding the mountain bike trails"*

*"Watching and hearing whales right in close to shore"*

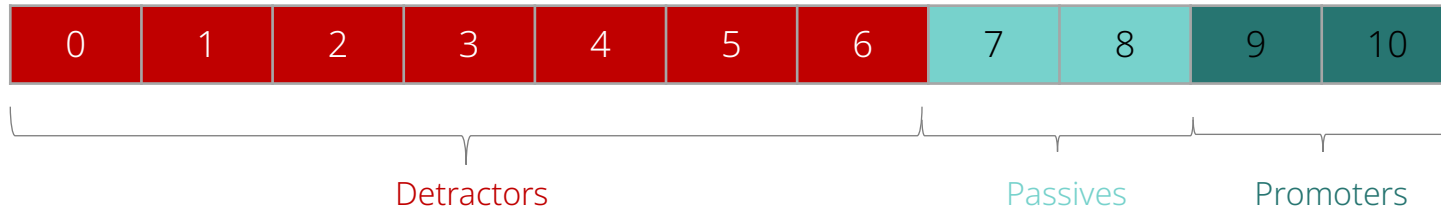


Advocacy

# Net Promoter Score (NPS)

Net Promoter Score is a common metric used by businesses to monitor customer experience and loyalty. It is based on a question asking likelihood to recommend on a 0 – 10 scale, and subtracts those who are 'detractors' (0-6) from those who are 'promoters' (9-10) to give a score on a scale of -100 to +100.

Q: Using this scale, how likely are you to recommend Western Australia as a holiday destination to other people?

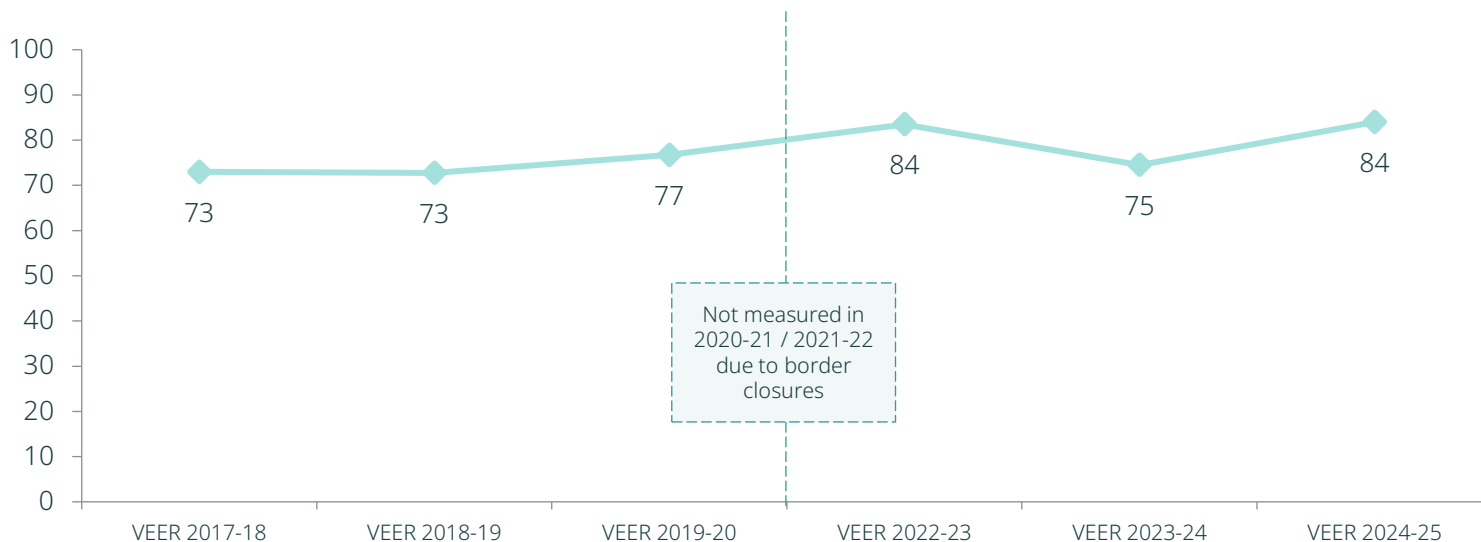


$$\begin{array}{c} \text{Promoters} \\ \% \end{array} - \begin{array}{c} \text{Detractors} \\ \% \end{array} = \text{NPS}$$

## Net Promoter Score (NPS) over time

WA's NPS is very high at 84 out of a maximum possible score of 100. As a comparison, Australia's NPS in 2024 amongst international leisure visitors was 66\*. After a small decline in 2023-24, WA's NPS has increased back to the level seen in 2022-23.

### Overall NPS by year %



\*Source: Tourism Research Australia, International Visitor Survey, 2024.

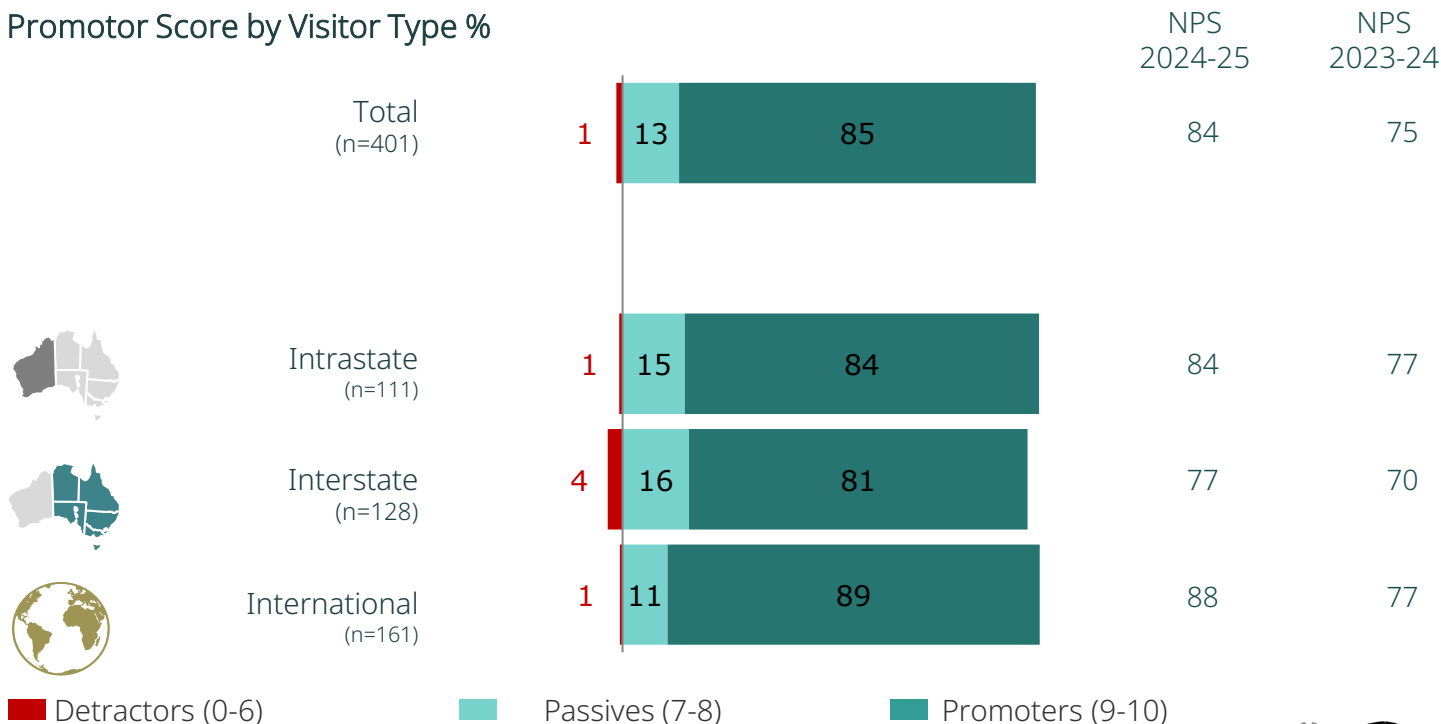
- SOURCE: Q10. Using this scale, how likely are you to recommend Western Australia as a holiday destination to other people?  
BASE: All respondents, 2024-25 n=401, 2023-24 n=400, 2022-23 n=400, 2019-20 n=270, 2018-19 n=400; 2017-18 n=400  
Not asked prior to 2017-18.



# Net Promoter Score (NPS) by market

The year on year increase in WA's NPS was driven by a growth in the proportion of 'promoters' (from 78% to 85%), and a drop in 'passives' (from 20% to 13%) and 'detractors' (from 3% to 1%). The growth in NPS was driven by all markets with the strongest NPS from international and intrastate visitors.

## 2024-25 Net Promotor Score by Visitor Type %



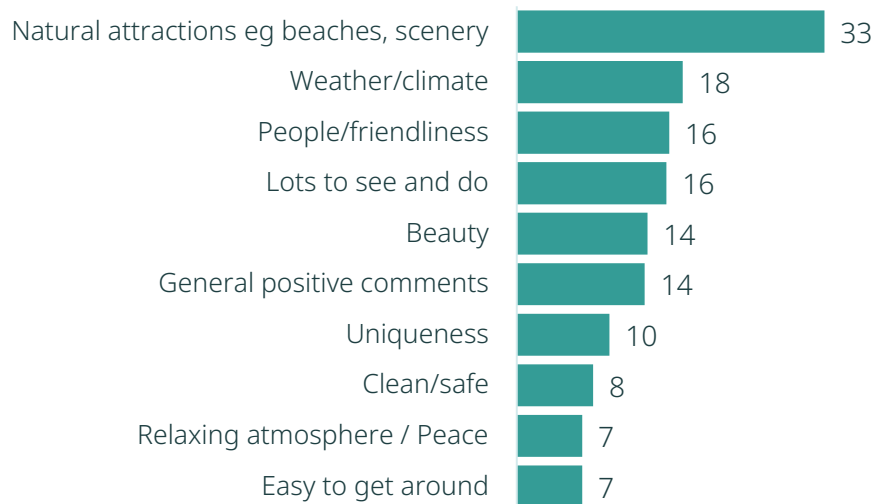


# Reason for recommending WA

Amongst the 85% of visitors who were 'promoters' of WA as a holiday destination, WA's natural attractions eg beaches, national parks and scenery was the most common reason cited. Weather/climate, friendly people and lots to see and do also rated highly.

## 2024-25 Main reason for recommending WA %

(Open ended question, coded responses)



Mentions 5% or more shown.



*"WA has the best beaches in the world"*

*"Variety of natural wonders"*

*"The freedom, emptiness, unspoiled natural surroundings"*

*"So many different things to do and everyone is so friendly"*

*"Relaxing/ beautiful scenery and climate"*

*"Forests down south, unique attractions, diversity of WA north to south"*

*"Its a beautiful place, so much to see and do and weather is good"*

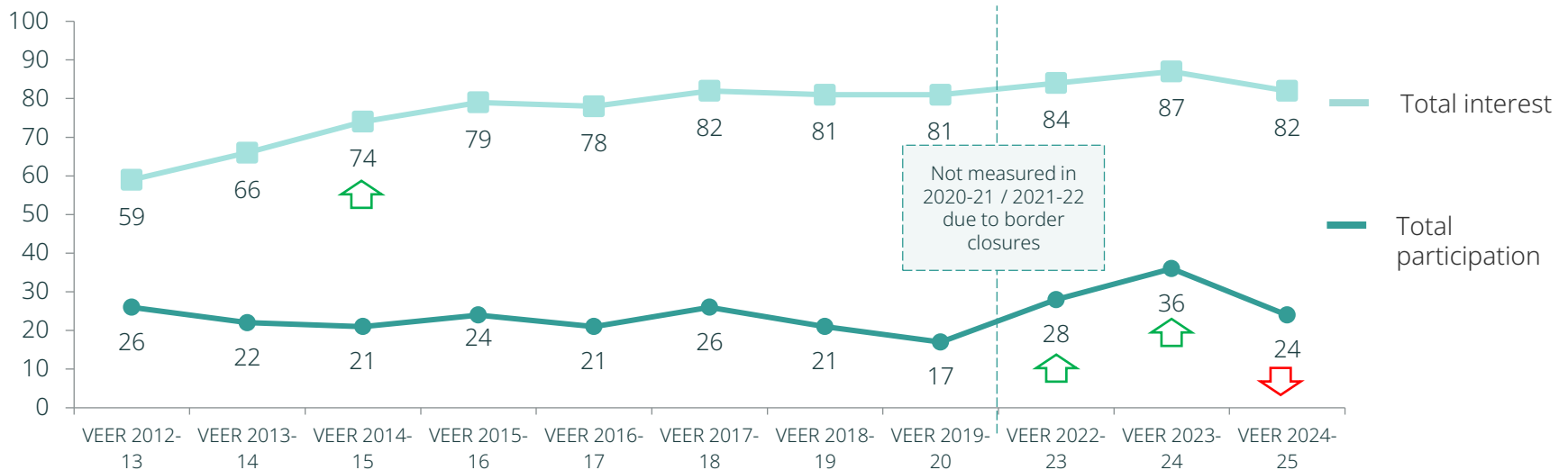


# Aboriginal Tourism

# Interest and participation in Aboriginal tourism

A quarter (24%) of visitors surveyed said they participated in an Aboriginal tourism experience, whilst this is a significant decline from 36% in 2023-24, it is in line with pre-COVID levels. However, visitor interest in Aboriginal tourism experiences continues to far outweigh participation, with four in five visitors (82%) in 2024-25 saying they would be interested in an Aboriginal tourism experience or activity if it were easily accessible in WA.

## Overall interest and participation in Aboriginal tourism by year %



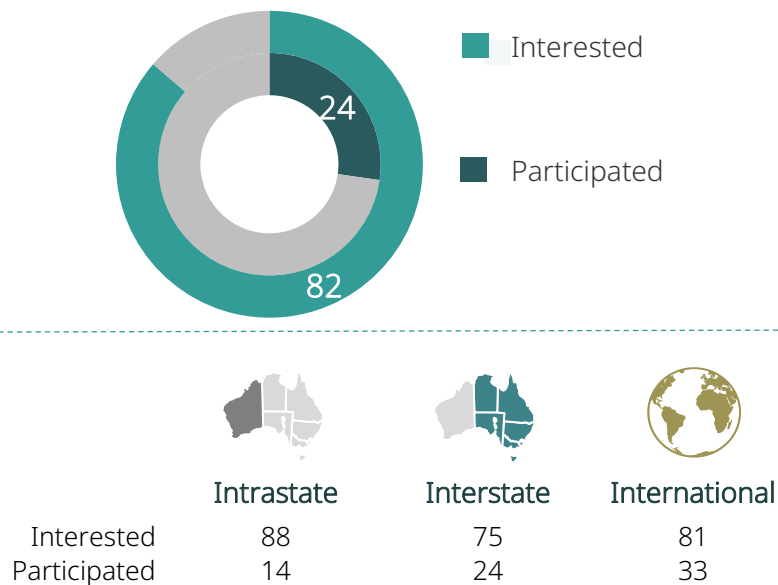
SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia? Q13. And which of these experiences or activities would you be interested in, if they were easily accessible in Western Australia? Note, "Experience Native bush food" was added to list of Aboriginal tourism experiences in 2017-18, which has resulted in a higher result for total interest from 2017-18. BASE: All respondents, 2024-25 n=401, 2023-24 n=400, 2022-23 n=400, 2019-20 n=270, 2018-19 n=400; 2017-18 n=400; 2016-17 n=400; 2015-16 n=400; 2014-15 n=401; 2013-14 n=400; 2012-13 n=400



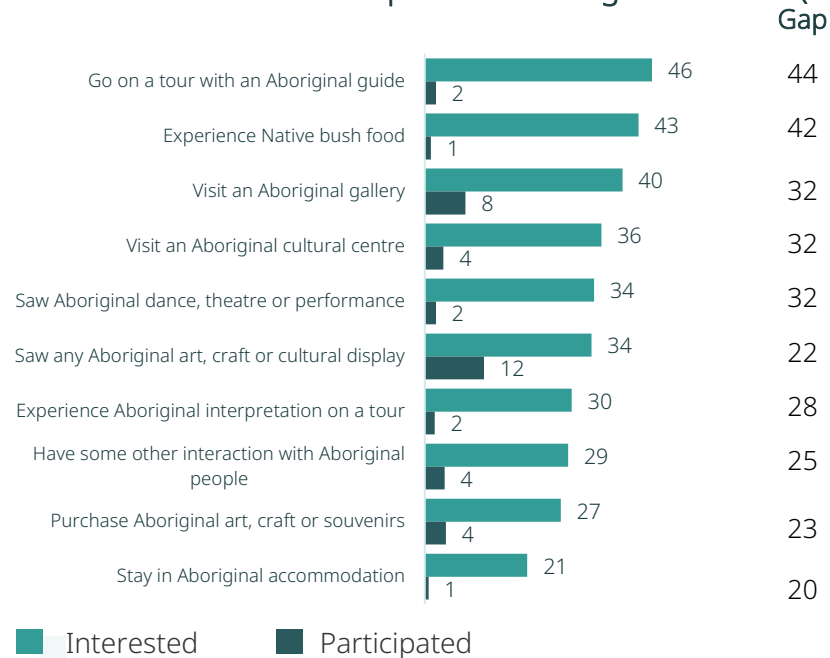
# Interest and participation in Aboriginal tourism

The decline in participation in Aboriginal tourism was seen across all markets. 'Go on a tour with an Aboriginal guide' and 'Experience Native Bush Food' generate the most interest, and the largest gap between interest and participation, indicating an opportunity for development. Seeing an Aboriginal art, craft or cultural display, and visiting Aboriginal galleries were the most common activities undertaken.

## 2024-25 Interest and participation in Aboriginal Tourism by Visitor Type (%)



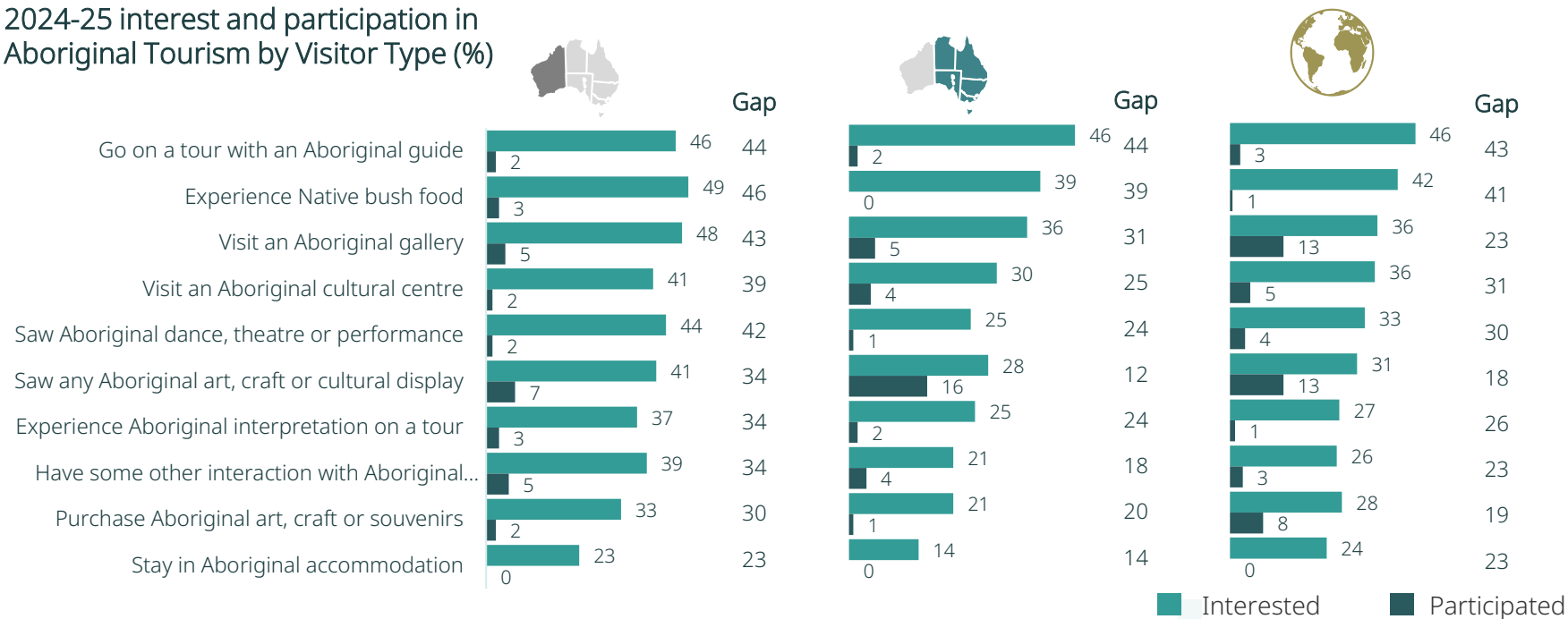
## 2024-25 Interest vs. Participation in Aboriginal tourism (%)



# Interest and participation in Aboriginal tourism

The gap between interest and participation is most significant for intrastate visitors; they are the most interested audience yet have the lowest participation rate. Across all visitor markets, the types of experiences visitors are more interested in is largely similar – with going on a tour with an Aboriginal guide and experiencing native bush food and ranking in the top three most appealing experiences across all three markets.

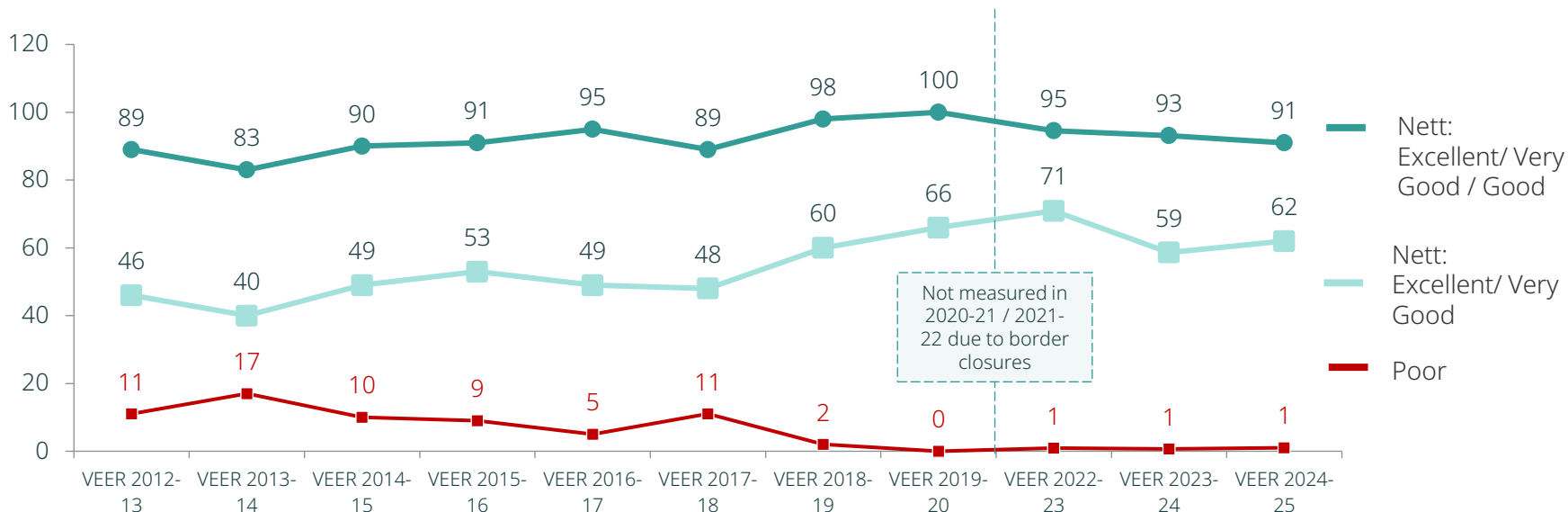
## 2024-25 interest and participation in Aboriginal Tourism by Visitor Type (%)



# Satisfaction of Aboriginal tourism

Those visitors who had participated in Aboriginal tourism continue to rate their experience highly. 62% rated their experience as 'excellent' or 'very good'.

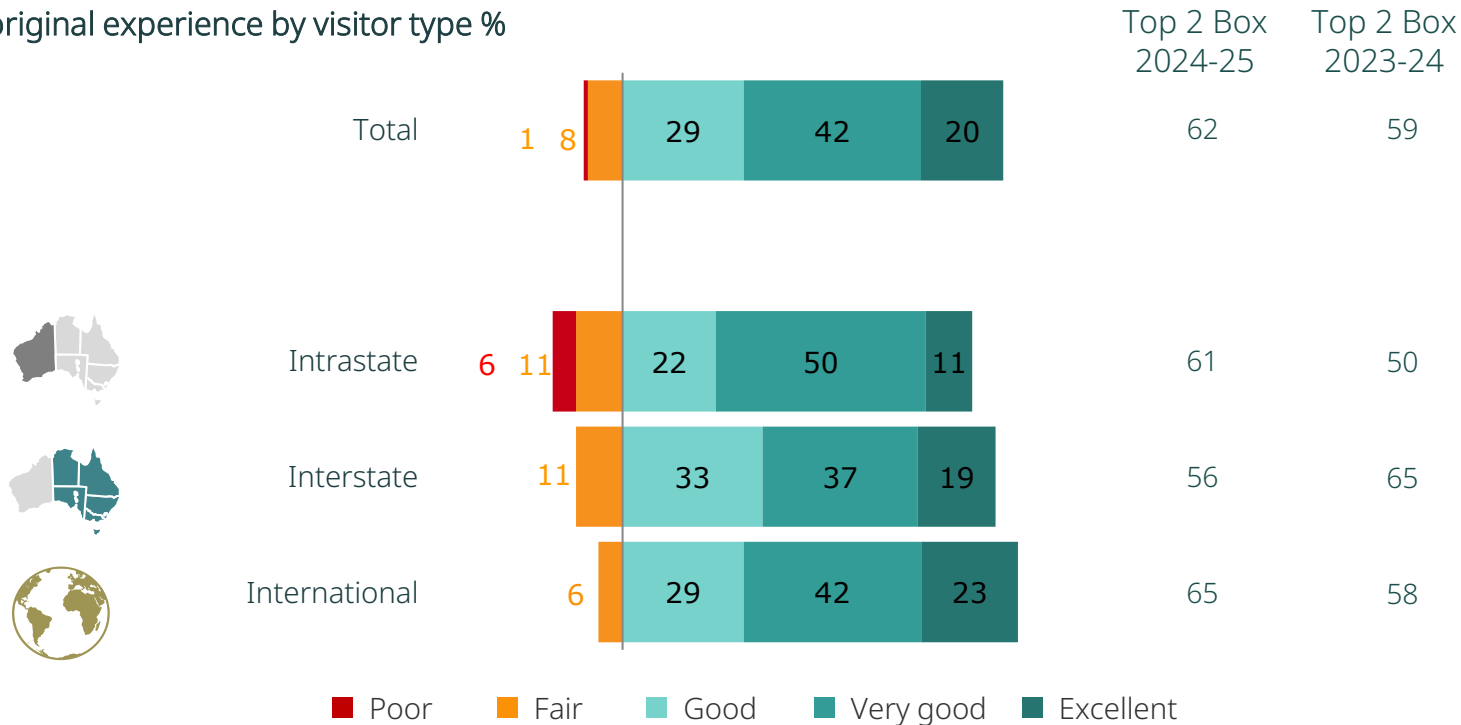
Overall satisfaction of Aboriginal tourism by year %



# Satisfaction of Aboriginal tourism by source market

Indicatively, international visitors were most satisfied with their Aboriginal tourism experience(s), and intrastate visitors were the only source market to rank their experience as poor. *Note: small sample sizes; results are indicative only.*

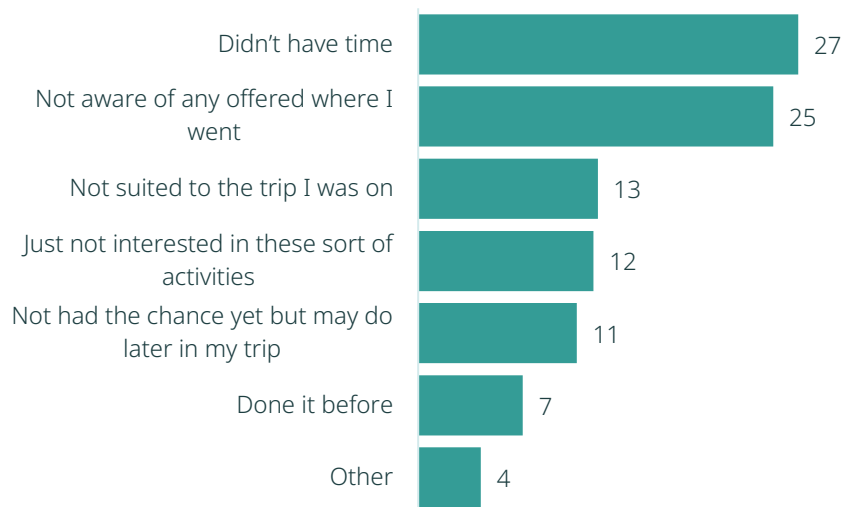
## 2024-25 Aboriginal experience by visitor type %



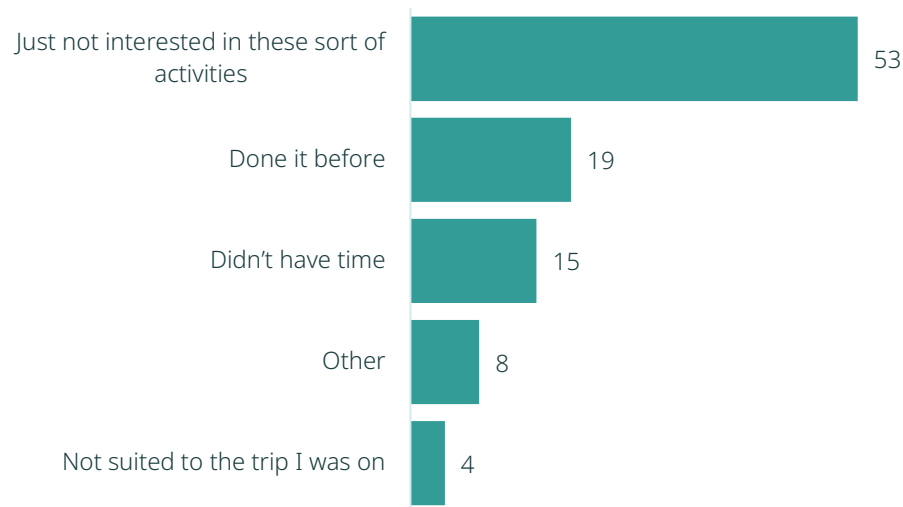
# Non-participation in Aboriginal Tourism

More than a quarter (27%) of those who did not participate in Aboriginal tourism said they didn't have time. Another quarter (25%) were not aware of any such experiences being on offer where they went. For those who were not interested, their main reasons were a lack of enthusiasm and a feeling of 'been there, done that'. Upselling the breadth and uniqueness of experiences available in WA may help to overcome these barriers.

2024-25 Non-participation in Aboriginal Experience %



2024-25 Non-interest in Aboriginal Experience %







# Appendix

# Intrastate Sample

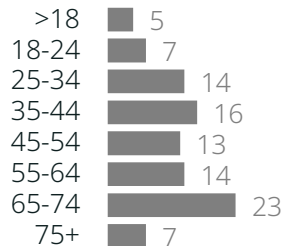
Of all visitors that were surveyed, intrastate visitors contained the highest proportion of family groups. Majority of intrastate visitors surveyed were from metropolitan Perth.



## GENDER %



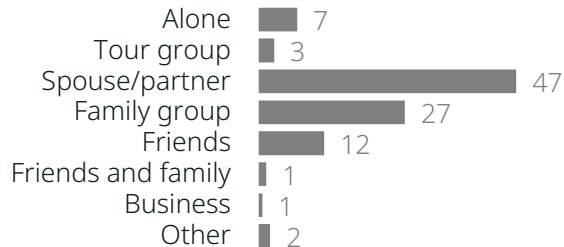
## AGE %



## HOME LOCATION %

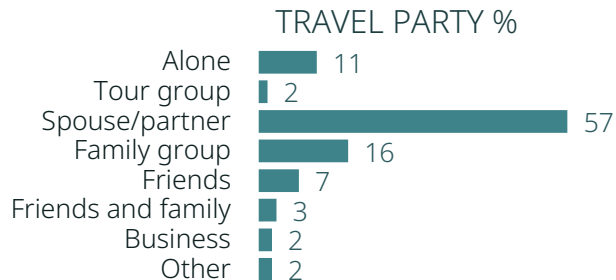
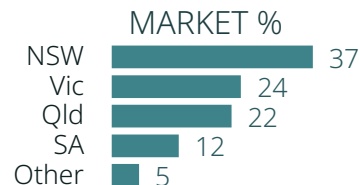
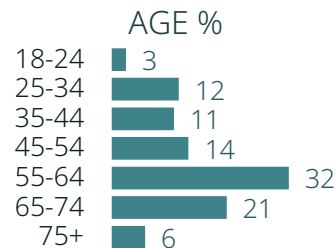
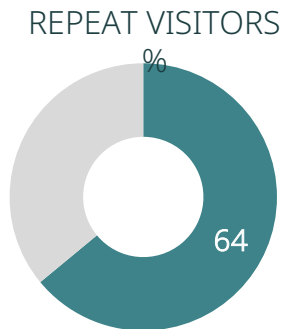


## TRAVEL PARTY %



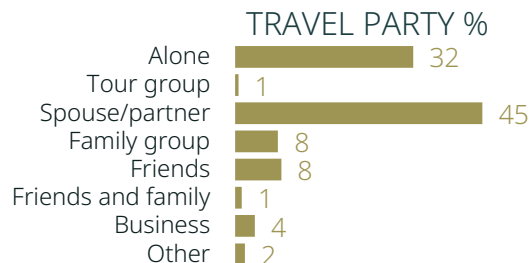
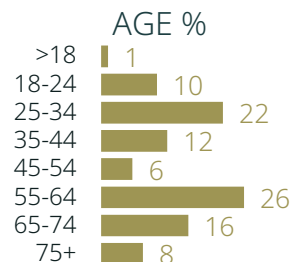
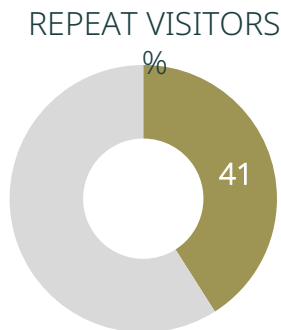
# Interstate Sample

Interstate visitors contained the highest proportion of couples and the largest portion fell into the 55+ age category. Visitors from interstate surveyed were mainly from New South Wales, Victoria and Queensland, and almost two thirds (64%) were repeat visitors to Western Australia.



# International Sample

International visitors contained the highest proportion of solo travellers, as well as a large number of couples. Visitors tended to be on the two ends of the age spectrum (under 35 years old and over 55 years old). International visitors surveyed were mostly from the UK or other European regions and two in five (41%) were repeat visitors to Western Australia.



# Satisfaction by market: Natural attractions, Friendliness of locals and Variety of things to see and do

	Very dissatisfied	Fairly dissatisfied	Neutral	Fairly satisfied	Very satisfied
Natural Attractions (e.g. beaches, National Parks)					
Intrastate	0%	0%	0%	6%	94%
Interstate	1%	0%	0%	14%	85%
International	0%	0%	0%	5%	95%
Total	0%	0%	0%	8%	92%
Friendliness of locals					
Intrastate	0%	2%	1%	22%	76%
Interstate	1%	1%	5%	14%	79%
International	0%	0%	1%	12%	87%
Total	0%	1%	2%	16%	81%
Variety of things to see and do					
Intrastate	0%	1%	5%	23%	71%
Interstate	1%	0%	3%	14%	82%
International	0%	0%	4%	24%	72%
Total	0%	0%	4%	21%	75%

- 42 • SOURCE: Q9. Thinking about your holiday in Western Australia overall, how satisfied or dissatisfied were you with ...?  
 BASE: All respondents n=400; Intrastate visitors n=132; Interstate visitors n=127; International visitors n=141.  
 NOTE: Not Applicable responses have been removed. %s are of those who answered the question.



# Satisfaction by market: Personal safety and security, Customer services, Manmade attractions

	Very dissatisfied	Fairly dissatisfied	Neutral	Fairly satisfied	Very satisfied
Personal safety and security					
Intrastate	1%	2%	4%	12%	82%
Interstate	1%	2%	1%	23%	74%
International	0%	0%	3%	18%	78%
Total	1%	1%	3%	18%	78%
Customer services					
Intrastate	0%	2%	6%	22%	70%
Interstate	1%	1%	7%	18%	73%
International	0%	0%	2%	21%	77%
Total	0%	1%	5%	21%	74%
Manmade attractions (eg museums, historical sites)					
Intrastate	0%	0%	9%	24%	67%
Interstate	1%	1%	4%	23%	71%
International	0%	1%	5%	25%	69%
Total	0%	1%	6%	24%	69%

43 • SOURCE: Q9. Thinking about your holiday in Western Australia overall, how satisfied or dissatisfied were you with ...?

BASE: All respondents n=400; Intrastate visitors n=132; Interstate visitors n=127; International visitors n=141. NOTE: Not Applicable responses have been removed. %s are of those who answered the question.



# Satisfaction by market: Food & drinks, Accommodation, Public transport, Nightlife

	Very dissatisfied	Fairly dissatisfied	Neutral	Fairly satisfied	Very satisfied
Accommodation					
Intrastate	0%	3%	7%	32%	58%
Interstate	1%	1%	5%	34%	59%
International	0%	4%	2%	26%	68%
Total	0%	3%	4%	30%	62%
Food & drinks					
Intrastate	0%	3%	7%	32%	58%
Interstate	1%	1%	5%	34%	59%
International	0%	4%	2%	26%	68%
Total	0%	3%	4%	30%	62%
Public transport					
Intrastate	7%	0%	0%	13%	80%
Interstate	2%	5%	6%	17%	71%
International	1%	6%	4%	11%	78%
Total	2%	5%	5%	13%	76%
Nightlife					
Intrastate	0%	7%	24%	22%	46%
Interstate	0%	3%	16%	45%	35%
International	0%	3%	20%	30%	47%
Total	0%	4%	20%	31%	44%

44 • SOURCE: Q9. Thinking about your holiday in Western Australia overall, how satisfied or dissatisfied were you with ...?

BASE: All respondents n=400; Intrastate visitors n=132; Interstate visitors n=127; International visitors n=141.

NOTE: Not Applicable responses have been removed. %s are of those who answered the question.

