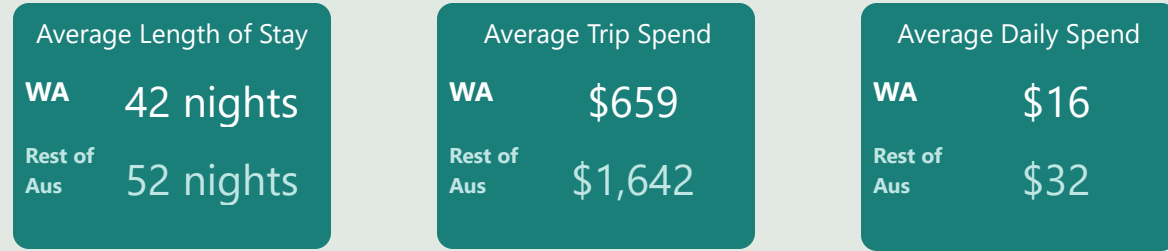


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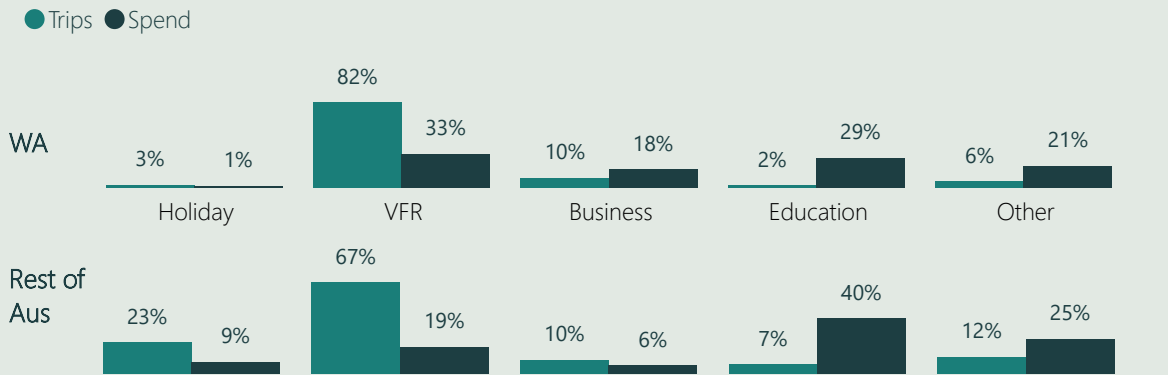
MARKET OVERVIEW

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

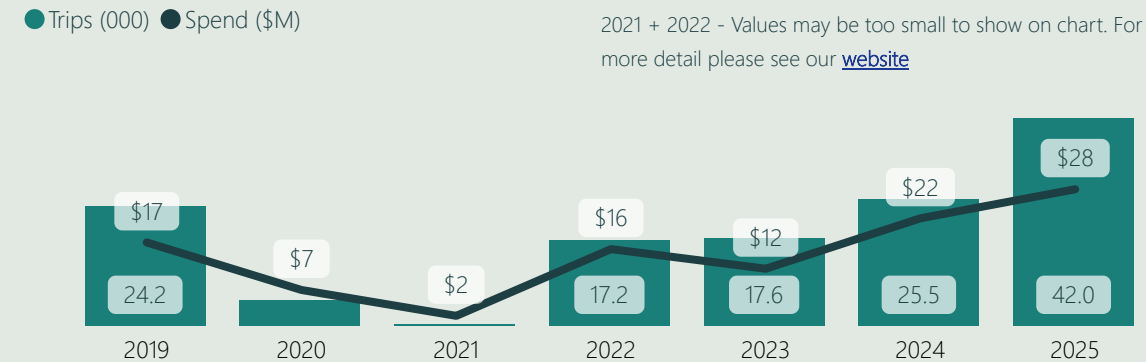
Rest of Aus is an average of all other states excluding WA



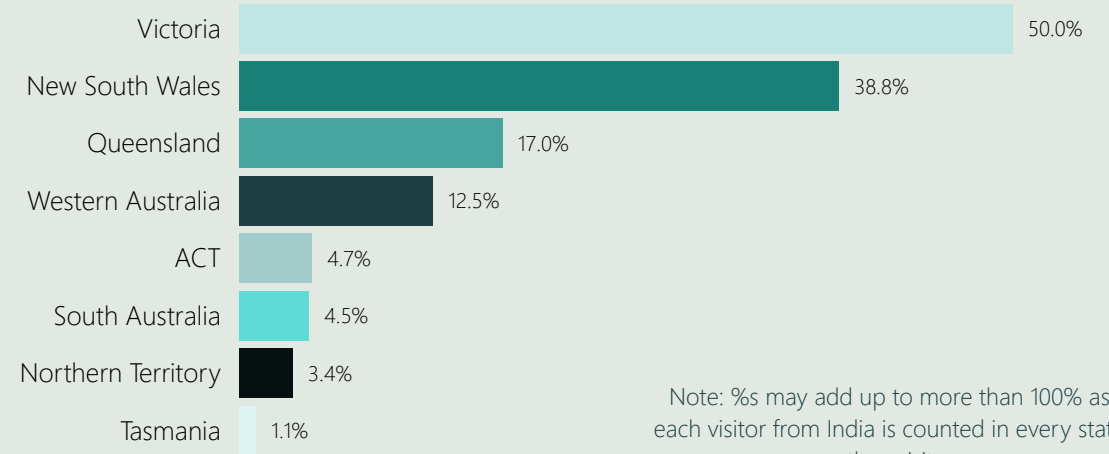
Total Trips and Spend by Purpose ¹



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 India is counted in every state they visit.

Market Share of Leisure Trip Spend in Australia ¹



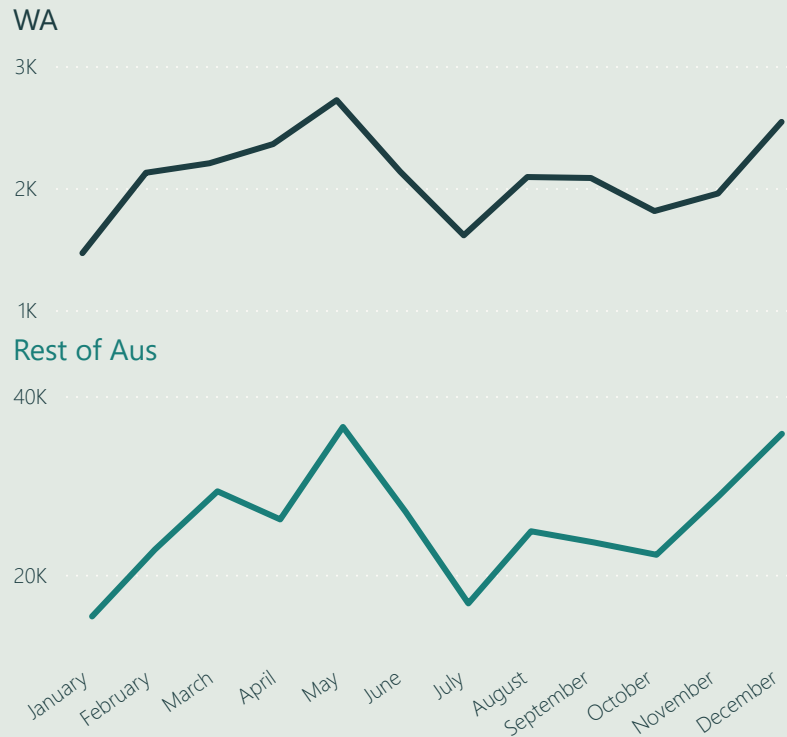
Explanatory note: 5.3% of all Indian leisure trip spend in Australia was spent in WA.

Legend: WA (dark teal), NSW (teal), VIC (light teal), QLD (medium teal), SA (cyan), TAS (lightest teal), NT (black), ACT (grey)

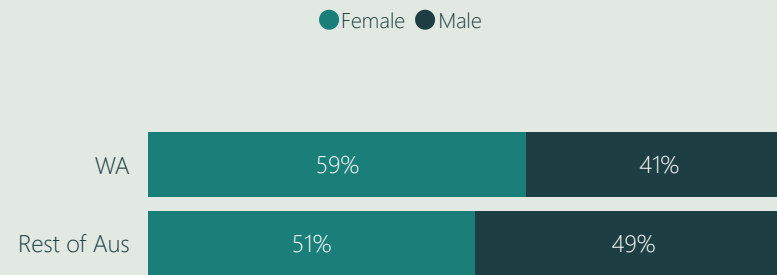
INDIA | MARKET PROFILE

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

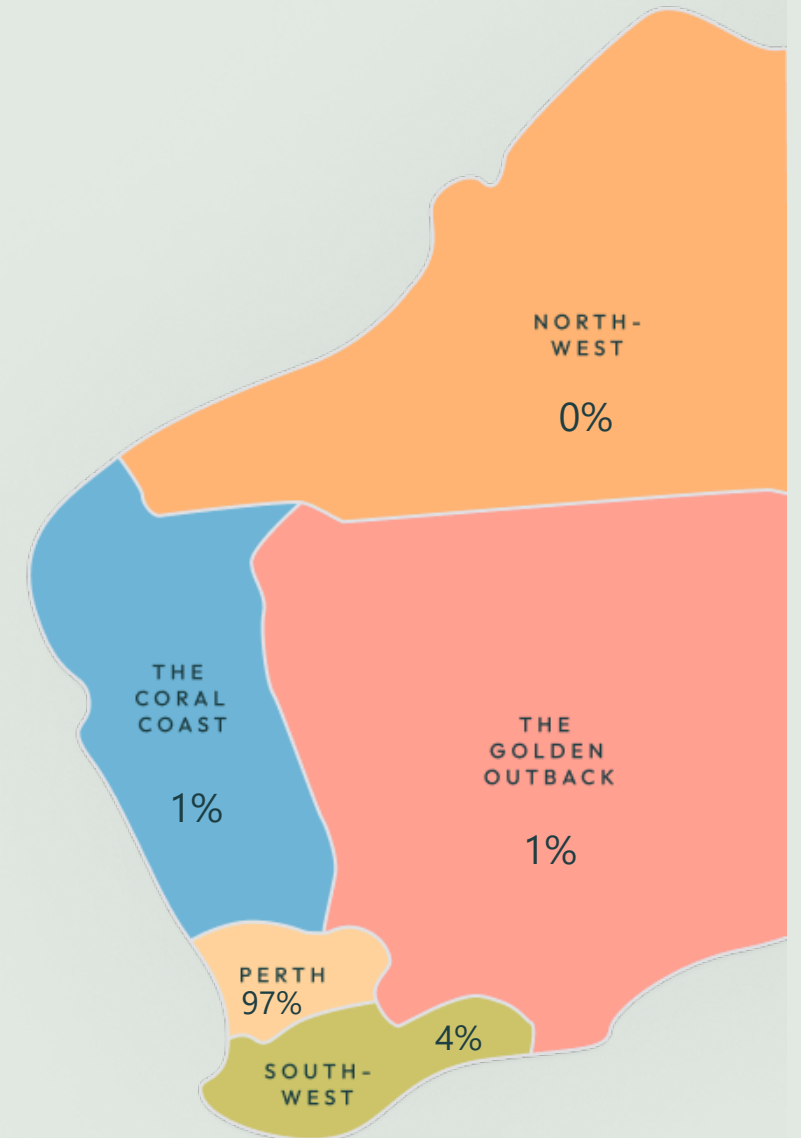
Seasonality - Short-term Leisure Visitor Arrivals ⁴



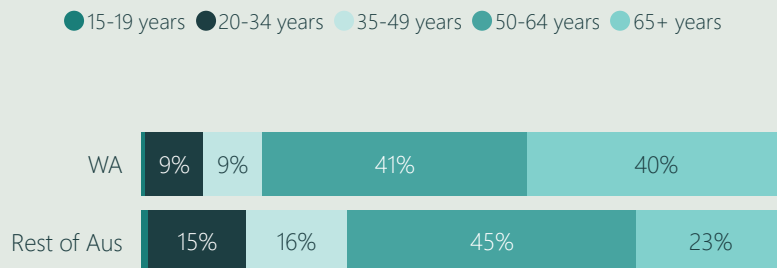
Gender ³



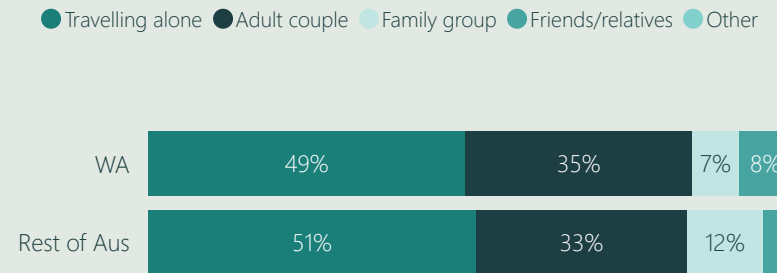
Regional Dispersal ³



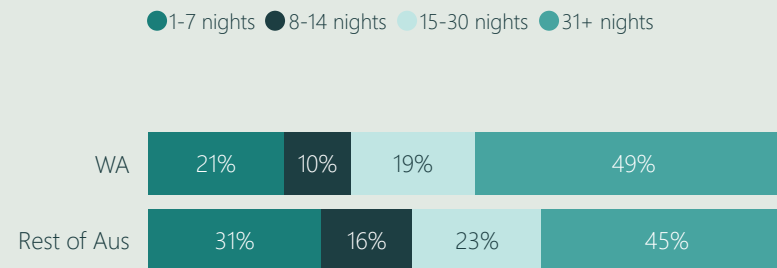
Age ³



Travel Party ³



Average Length of Stay in State ³



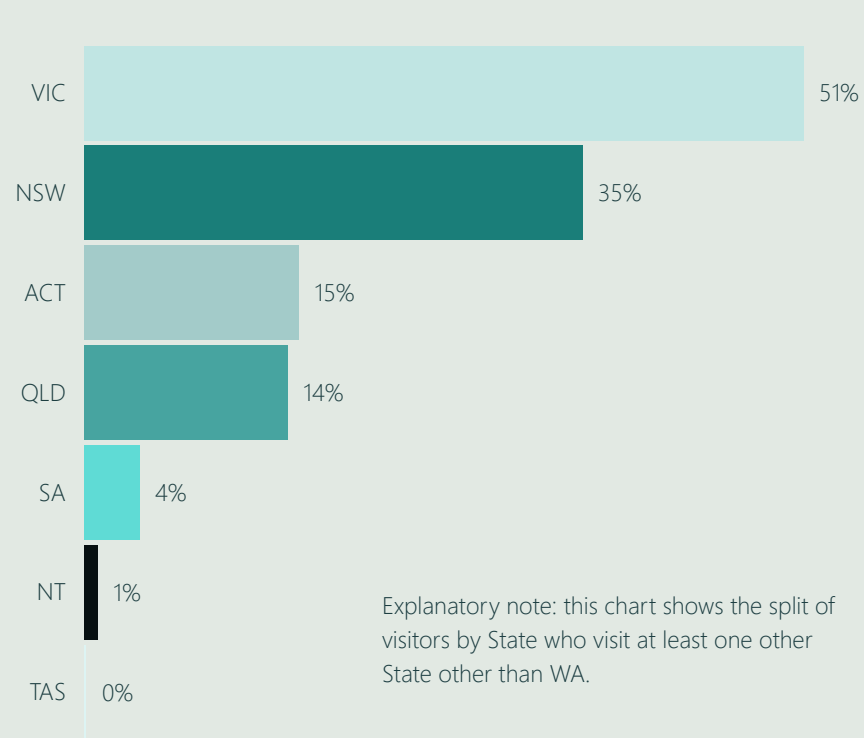
INDIA | MARKET PROFILE

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 | 94% | 86% |
| ② Sightseeing/looking around | 87% | 80% |
| ③ Go to the beach | 78% | 73% |
| ④ Go shopping for pleasure | 78% | 85% |
| ⑤ Visit botanical or other public gardens | 68% | 47% |
| ⑥ Visit national parks / state parks | 61% | 46% |
| ⑦ Go to markets | 57% | 58% |
| ⑧ Visit buildings or sites of historical interest | 40% | 32% |
| ⑨ Visit wildlife parks / zoos / aquariums | 38% | 38% |
| ⑩ Visit museums or art galleries | 36% | 33% |

Other States Visited ³



Group Tour v Free Independent Travellers (FIT) ³

77% of Indian leisure visitors to WA are free independent travellers. 94% of Indian leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

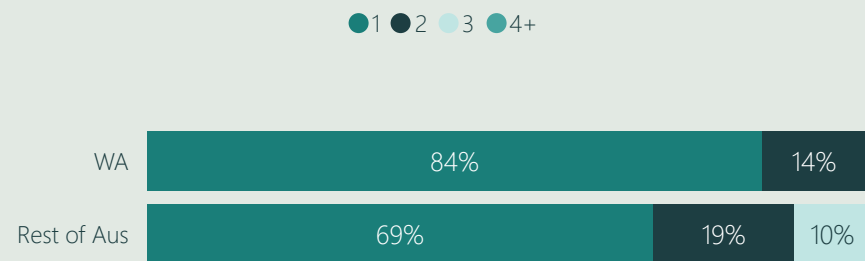
Repeat Visitors ³

62% of Indian leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 51%.

Top 3 Accommodation Choices for Leisure Visitors to WA ³

| | WA | Rest of Aus |
|-----------------------------------|-----|-------------|
| | % | % |
| ① Friends or relatives property | 85% | 80% |
| ② Hotel/resort/motel or motor Inn | 14% | 26% |
| ③ Other commercial accommodation | 2% | 10% |

Number of States Visited ³



Travel Packages ³

2% of Indian 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

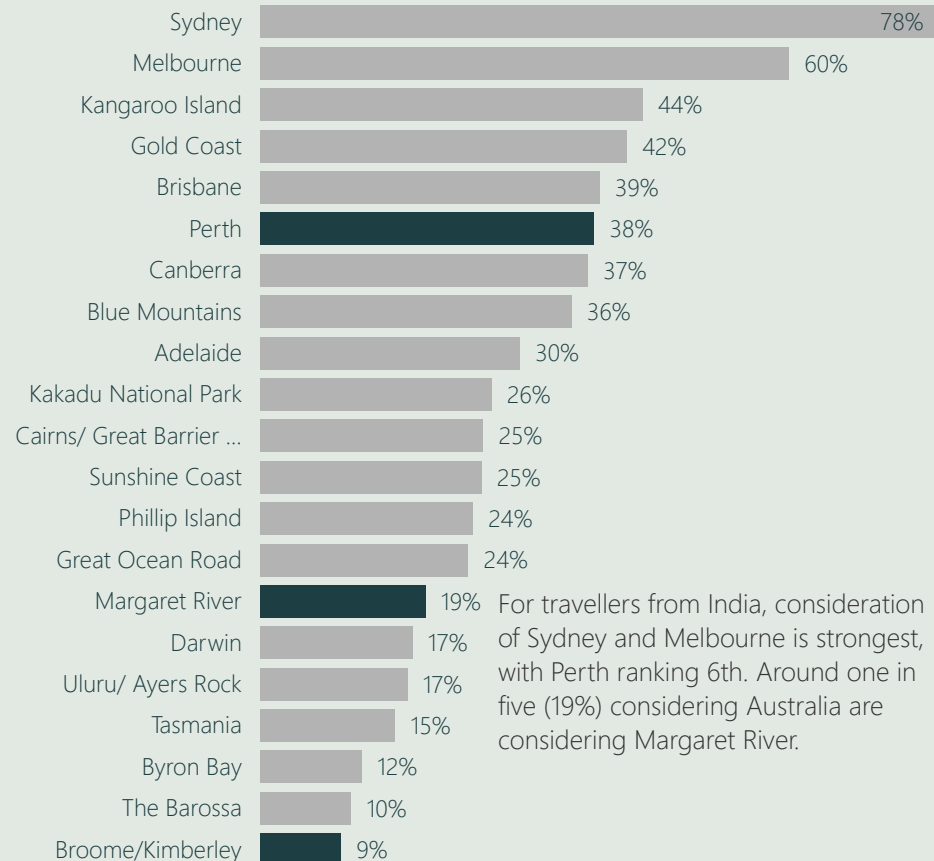
Out of region (OOR) travellers



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 travellers from India, consideration of Sydney and Melbourne is strongest, with Perth ranking 6th. Around one in five (19%) considering Australia are considering Margaret River.

Which factors are most important when choosing a destination ⁵

- ① A safe and secure destination
- ② A family friendly destination
- ③ Value for money
- ④ Appealing climate or weather
- ⑤ Easy to get to (time & effort)

Indian travellers are looking for a safe and secure destinations that are family friendly and value for money. Compared to the average traveller, they place less importance on destinations that are easy to get to (time & effort).

What OOR travellers associate with destinations ⁵

| | Sydney | Melbourne | Brisbane | Perth | Margaret River | Broome/Kimberley region |
|--|--------|-----------|----------|-------|----------------|-------------------------|
| A family friendly destination | 45% | 37% | 27% | 25% | 16% | 16% |
| A vibrant city lifestyle | 53% | 42% | 28% | 29% | 15% | 14% |
| Beautiful natural environments | 28% | 24% | 18% | 20% | 23% | 17% |
| Different and interesting local wildlife | 25% | 22% | 18% | 19% | 17% | 16% |
| Good food, wine/beverages, local cuisine and produce | 41% | 36% | 25% | 25% | 18% | 17% |
| Interesting events and festivals | 44% | 36% | 23% | 24% | 17% | 16% |
| Value for money | 39% | 32% | 22% | 24% | 16% | 16% |

Indian travellers have similar associations of Perth and Brisbane. Perth's strongest association is a vibrant city lifestyle. Margaret River performs well in terms of beautiful natural environments.

INDIA | MARKET PROFILE

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. * Note: 2023 has a low sample size and should be used with caution.
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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