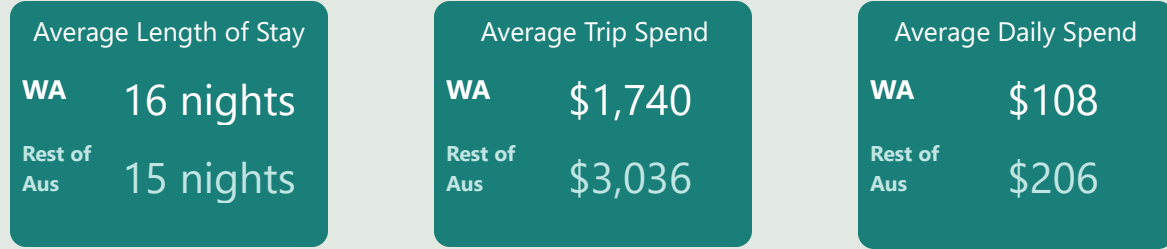


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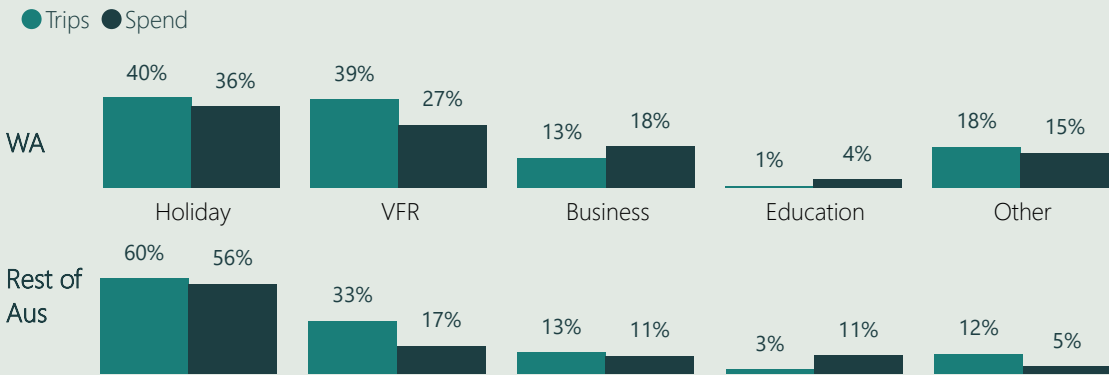
MARKET OVERVIEW

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

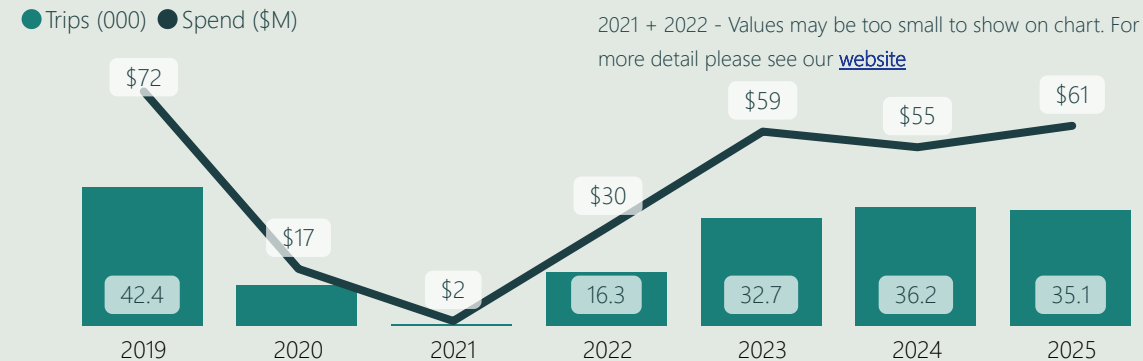
Rest of Aus is an average of all other states excluding WA



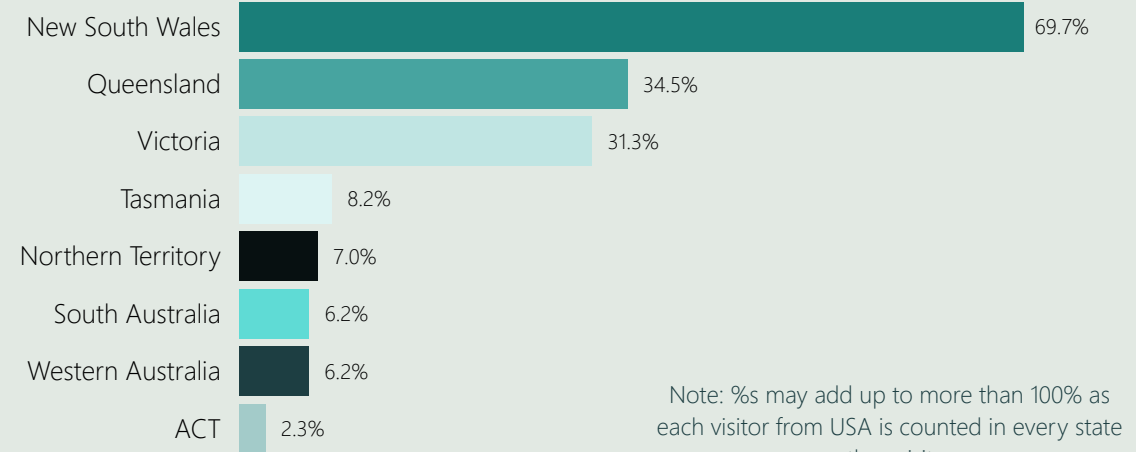
Total Trips and Spend by Purpose ¹



Leisure Visitation and Spend in WA ²

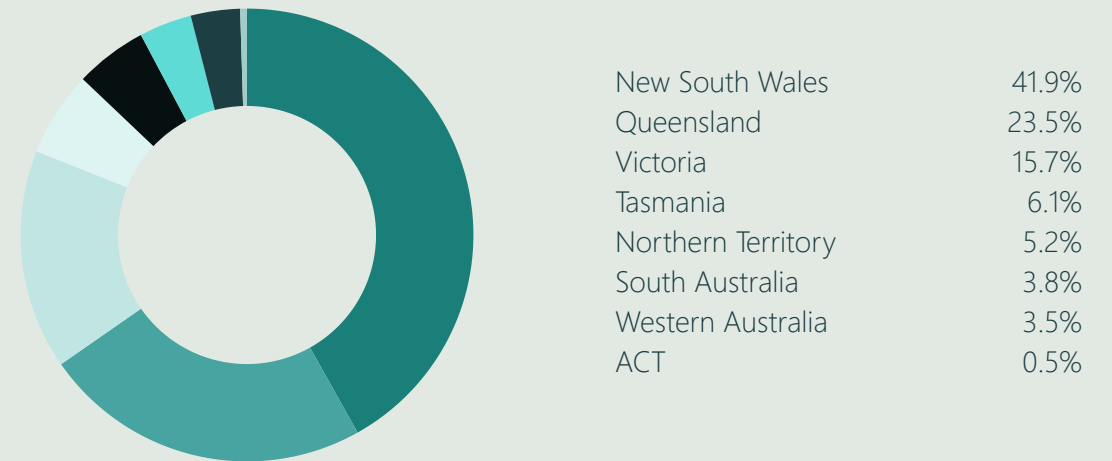


Market Share of Leisure Trips to Australia ¹



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

Market Share of Leisure Trip Spend in Australia ¹



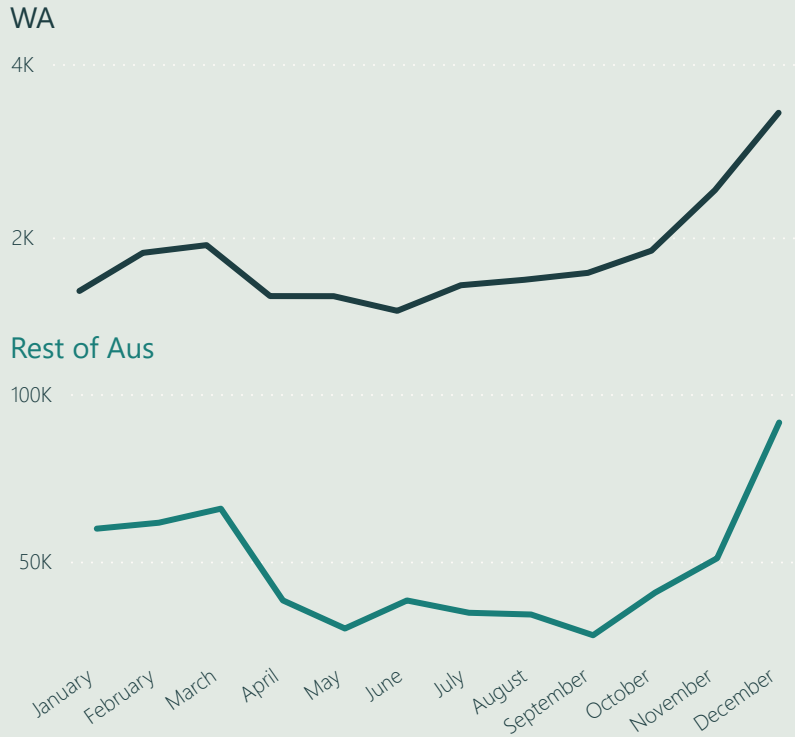
Explanatory note: 3.5% of all US leisure trip spend in Australia was spent in WA.

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

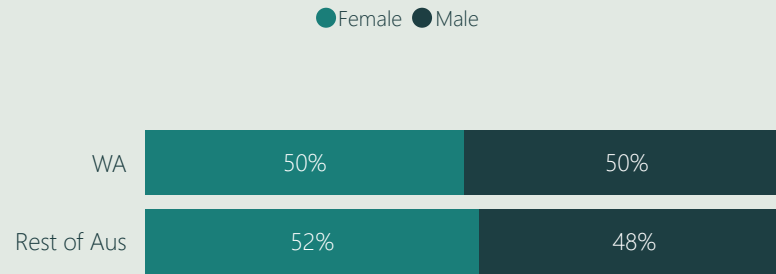
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LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

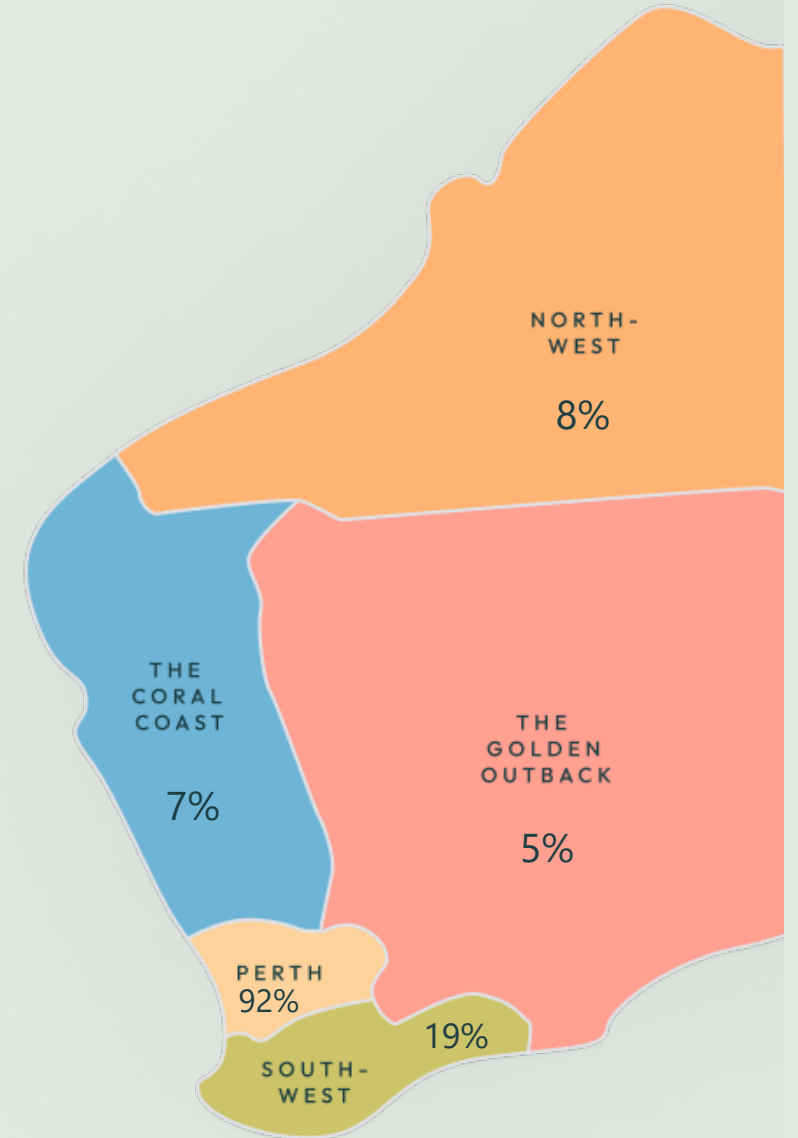
Seasonality - Short-term Leisure Visitor Arrivals ⁴



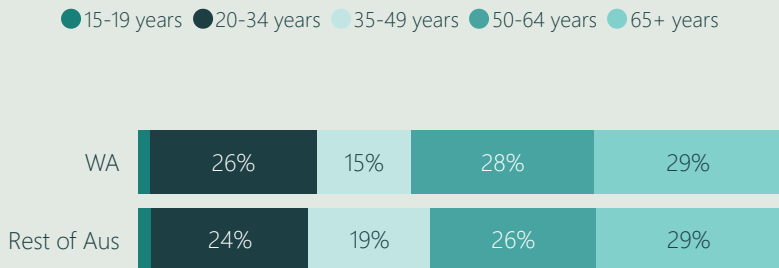
Gender ³



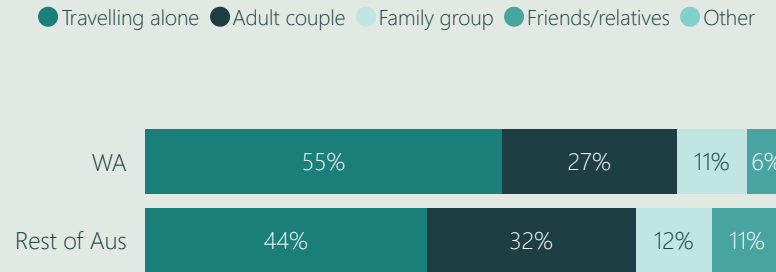
Regional Dispersal ³



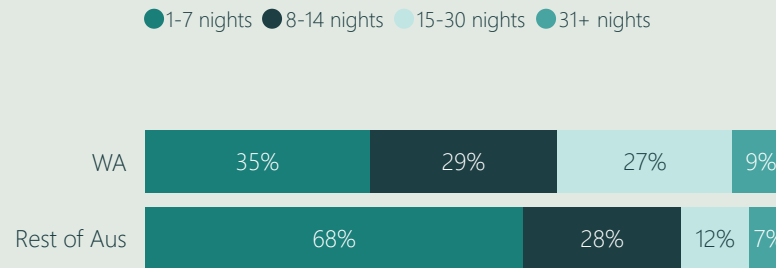
Age ³



Travel Party ³



Average Length of Stay in State ³



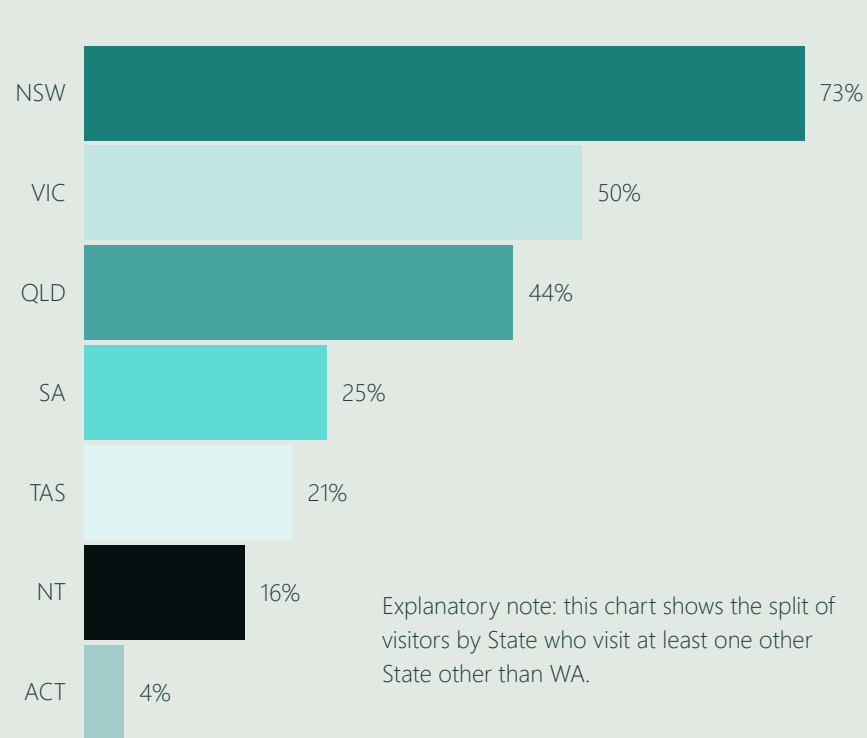
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LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

Top 10 Activities for Leisure Visitors to WA ³*

	WA	Rest of Aus
	%	%
① Eat out / dine at a restaurant and/or cafe	93%	92%
② Sightseeing/looking around	89%	87%
③ Go shopping for pleasure	82%	77%
④ Go to the beach	81%	69%
⑤ Visit national parks / state parks	71%	53%
⑥ Go to markets	54%	49%
⑦ Visit botanical or other public gardens	54%	50%
⑧ Pubs, clubs, discos etc	50%	42%
⑨ Visit buildings or sites of historical interest	48%	41%
⑩ Visit wildlife parks / zoos / aquariums	47%	51%

Other States Visited ³



Group Tour v Free Independent Travellers (FIT) ³

93% of US leisure visitors to WA are free independent travellers. 93% of US leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

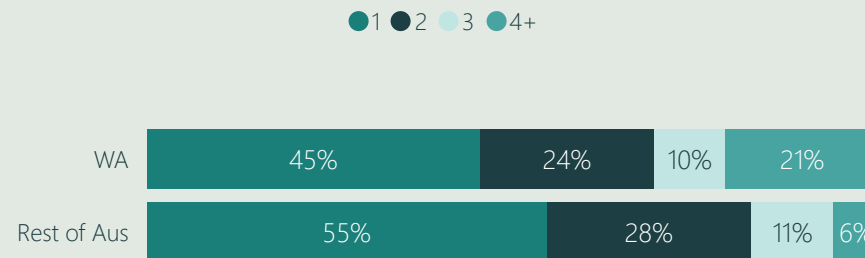
Repeat Visitors ³

49% of US leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 38%.

Top 3 Accommodation Choices for Leisure Visitors to WA ³

	WA	Rest of Aus
	%	%
① Friends or relatives property	60%	37%
② Hotel/resort/motel or motor Inn	36%	65%
③ Other commercial accommodation	15%	22%

Number of States Visited ³



Travel Packages ³

5% of US leisure visitors to WA arrived on a travel package and the percentage this type of visitor makes up in the rest of Australia is 9%.

*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

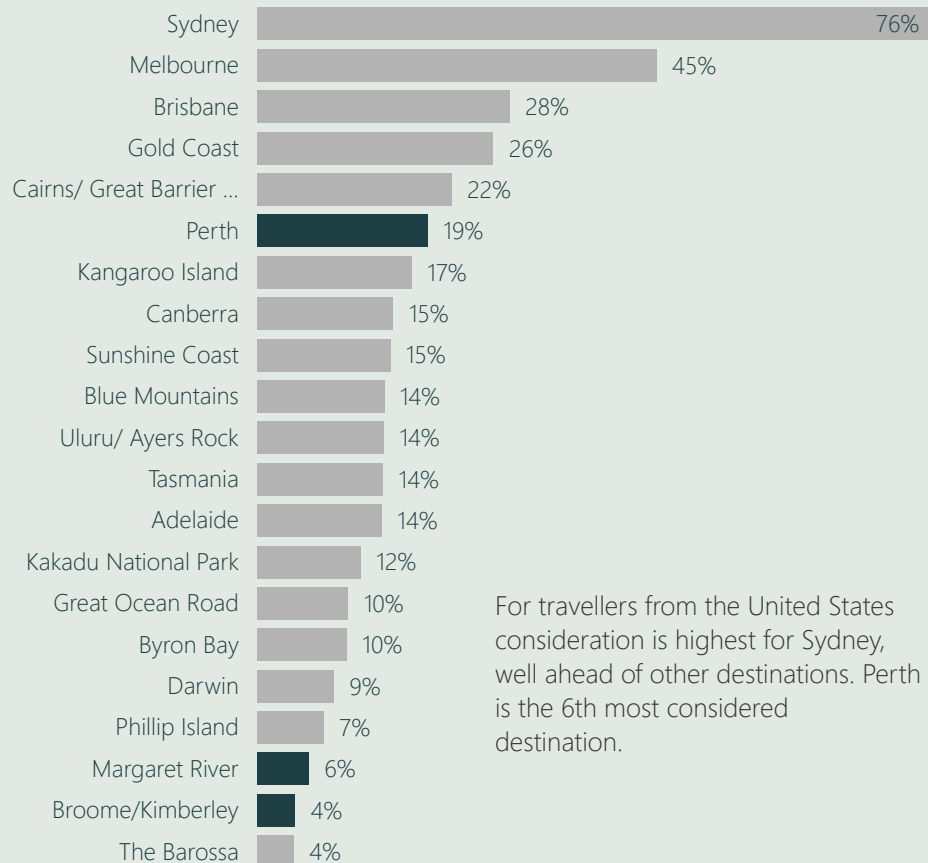
Out of region (OOR) travellers



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 the United States consideration is highest for Sydney, well ahead of other destinations. Perth is the 6th most considered destination.

Which factors are most important when choosing a destination ⁵

- ① A safe and secure destination
- ② Appealing climate or weather
- ③ Good food, wine/beverages, local cuisine and produce
- ④ Value for money
- ⑤ Good accommodation options
- ⑥ Easy to obtain an entry visa

US travellers are more likely than the average traveller to be seeking a safe and secure destination. An appealing climate/weather is also very important to them. They also place more importance on good food/wine and local produce than the average traveller.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	44%	28%	16%	15%	8%	7%
A vibrant city lifestyle	51%	33%	17%	17%	7%	6%
Beautiful natural environments	26%	17%	12%	12%	14%	9%
Different and interesting local wildlife	22%	15%	11%	11%	9%	9%
Good food, wine/beverages, local cuisine and produce	46%	31%	17%	16%	8%	7%
Interesting events and festivals	44%	28%	16%	15%	8%	8%
Value for money	32%	21%	12%	13%	9%	6%

USA travellers have strong perceptions of Sydney; it tops the list of associations for all attributes. Perth performs similarly to Brisbane on key attributes.

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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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