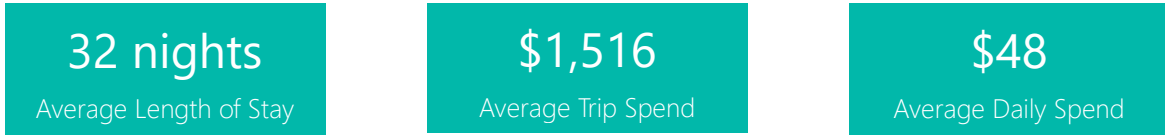


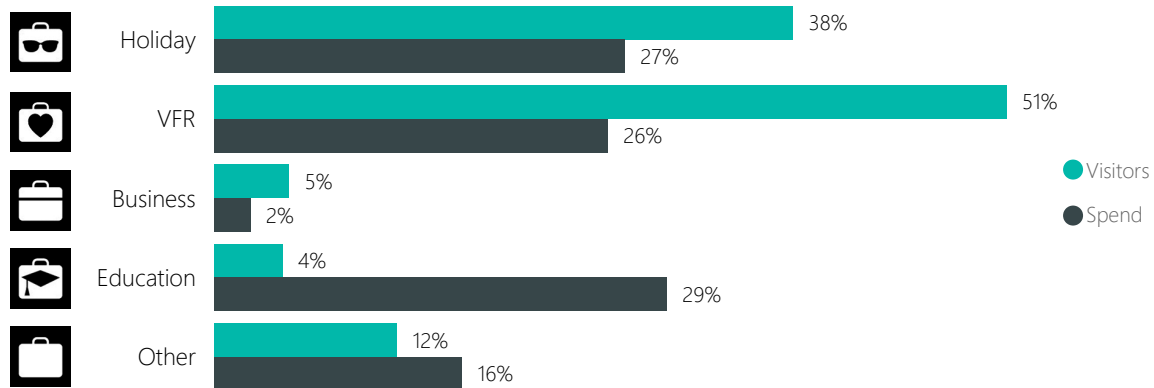
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MARKET OVERVIEW

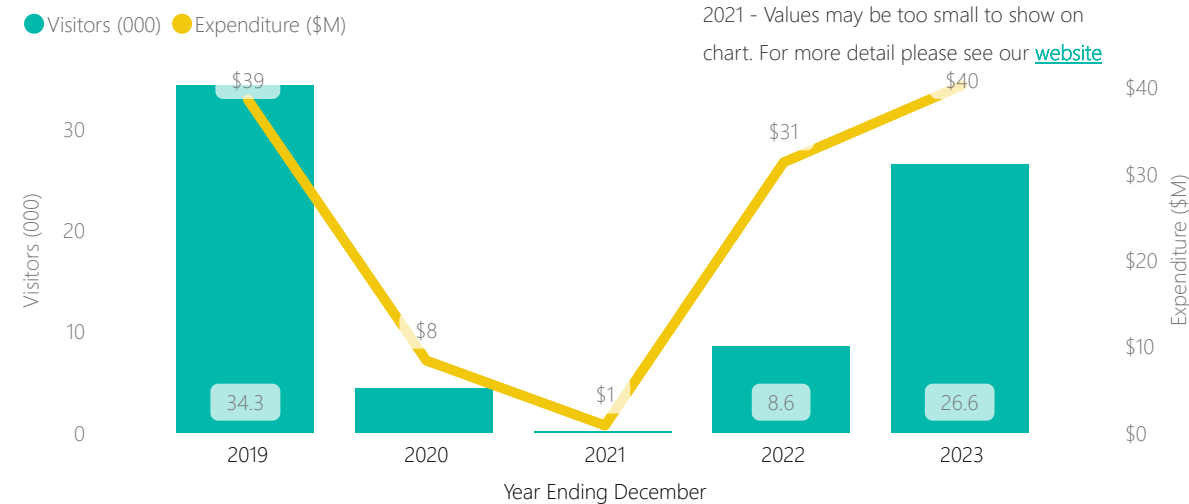
Leisure Visitation to WA¹



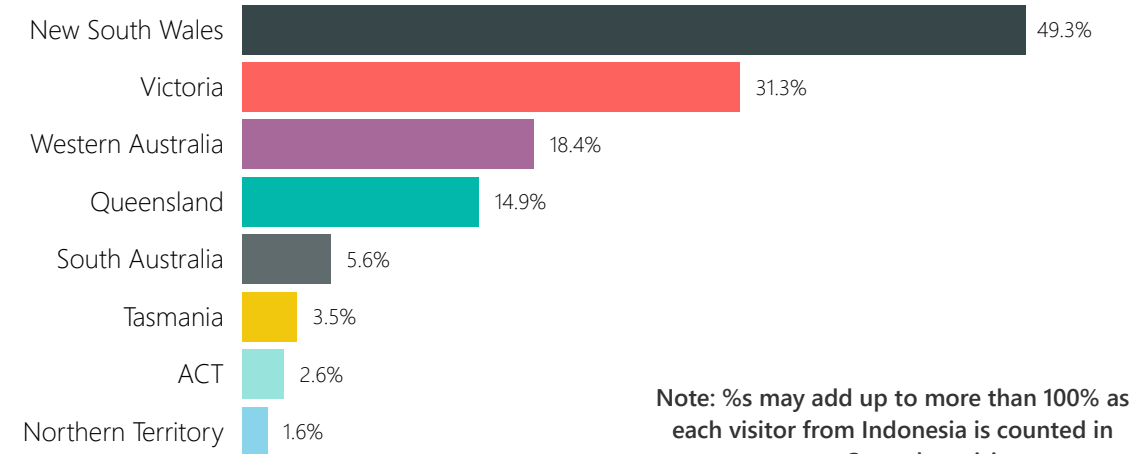
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

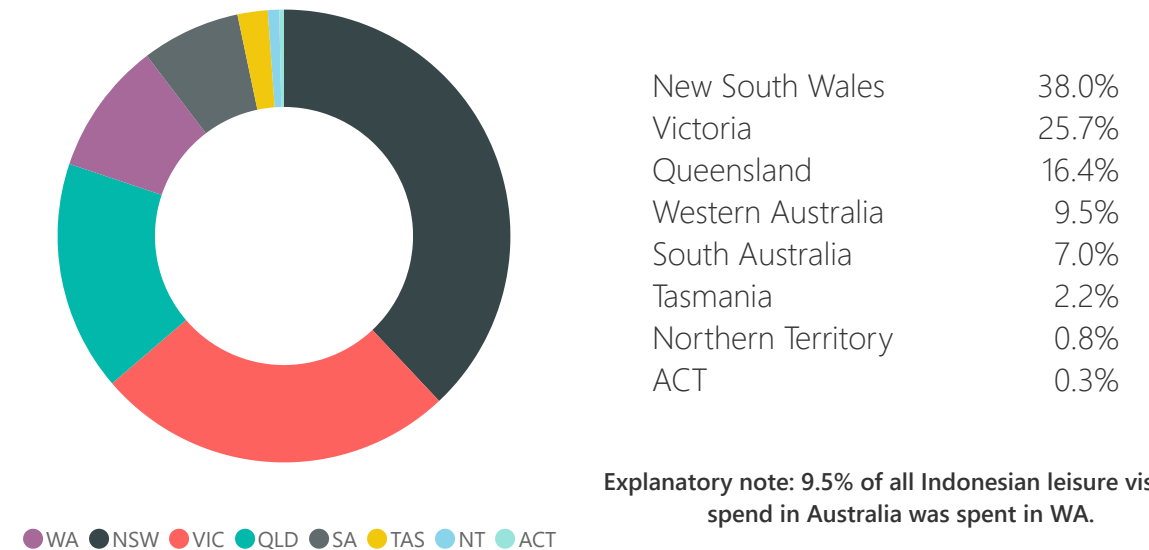


Market Share of International Leisure Visitors to Australia¹



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

Market Share of International Leisure Visitor Spend in Australia¹

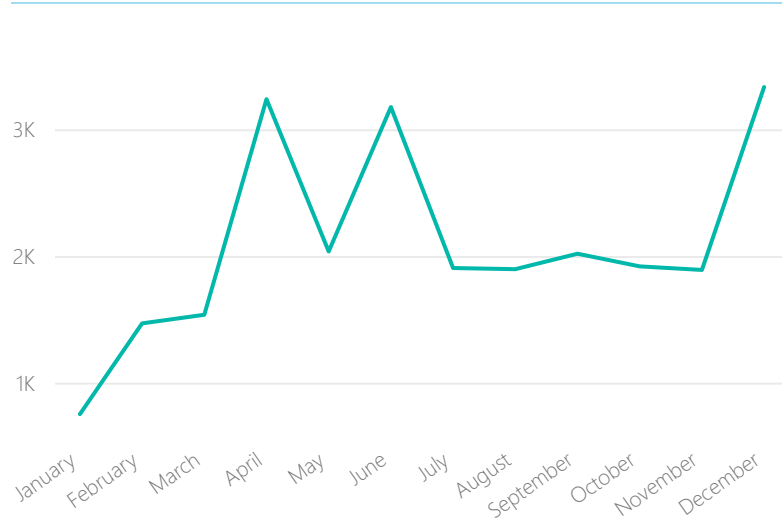


Explanatory note: 9.5% of all Indonesian leisure visitor spend in Australia was spent in WA.

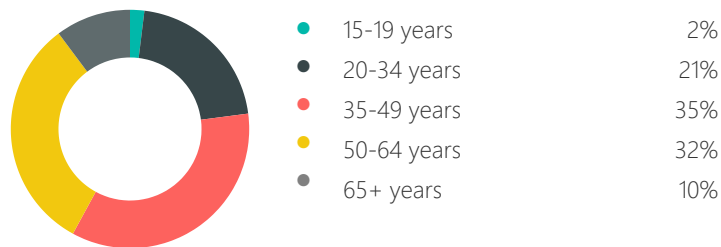
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TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

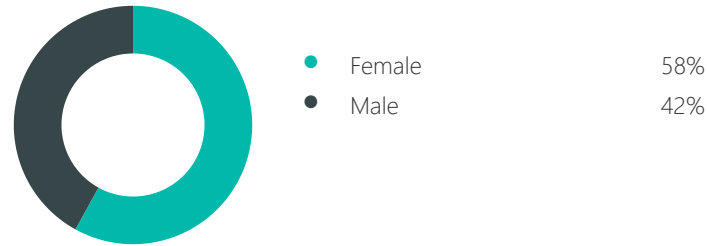
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



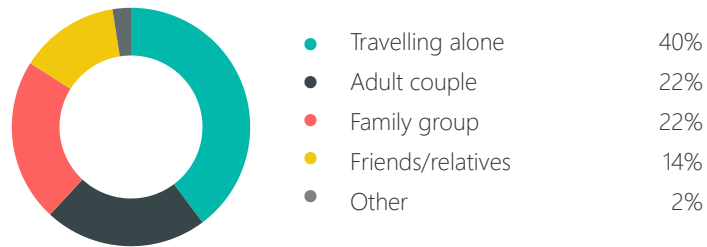
Age³



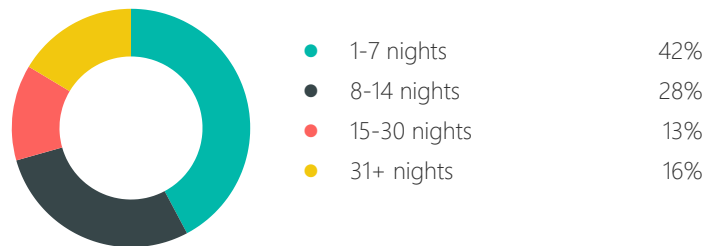
Gender³



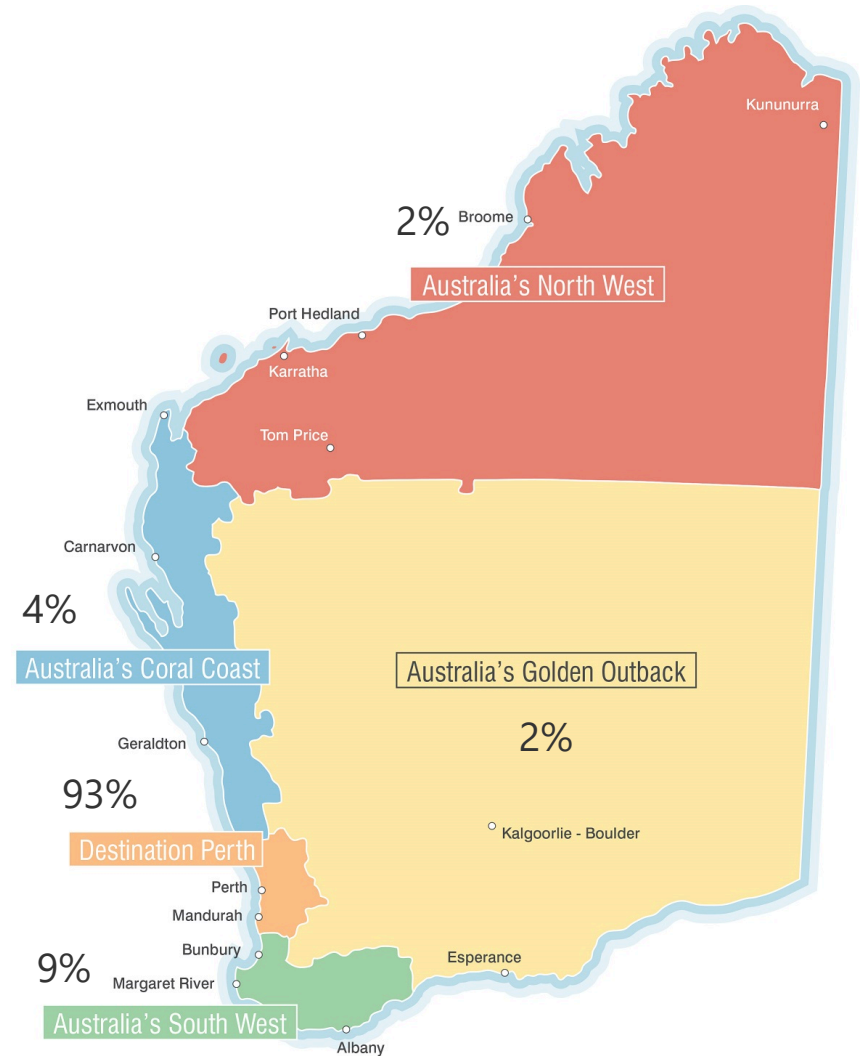
Travel Party³



Length of Trip³



Regional Dispersal³



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TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

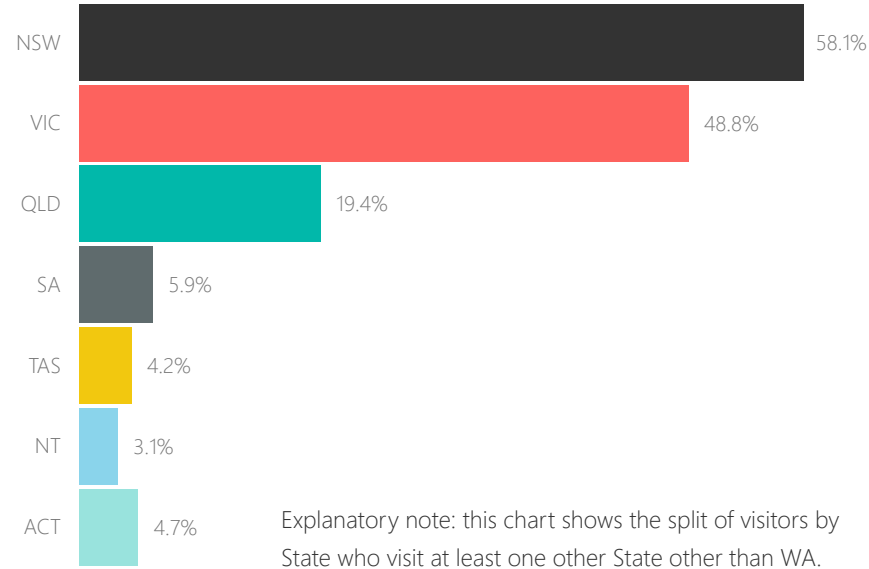
1	Eat out / dine at a restaurant and/or cafe	94%
2	Go shopping for pleasure	92%
3	Go to markets	59%
4	Go to the beach	57%
5	Sightseeing/looking around	73%

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

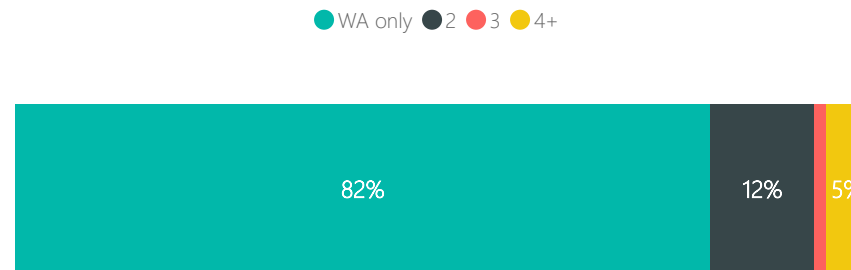
Top 3 Accommodation Choices for Leisure Visitors to WA³

1	Other Private Accommodation	53%
2	Friends or relatives property	49%
3	Hotel/resort/motel or motor Inn	39%

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

96% of Indonesian leisure visitors to WA are free independent travellers. Equally, 93% 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 Visitors³

78% of Indonesian leisure visitors to WA are on a return visit to Australia

Travel Packages³

7% of Indonesian leisure visitors to WA arrived on a travel package

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IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

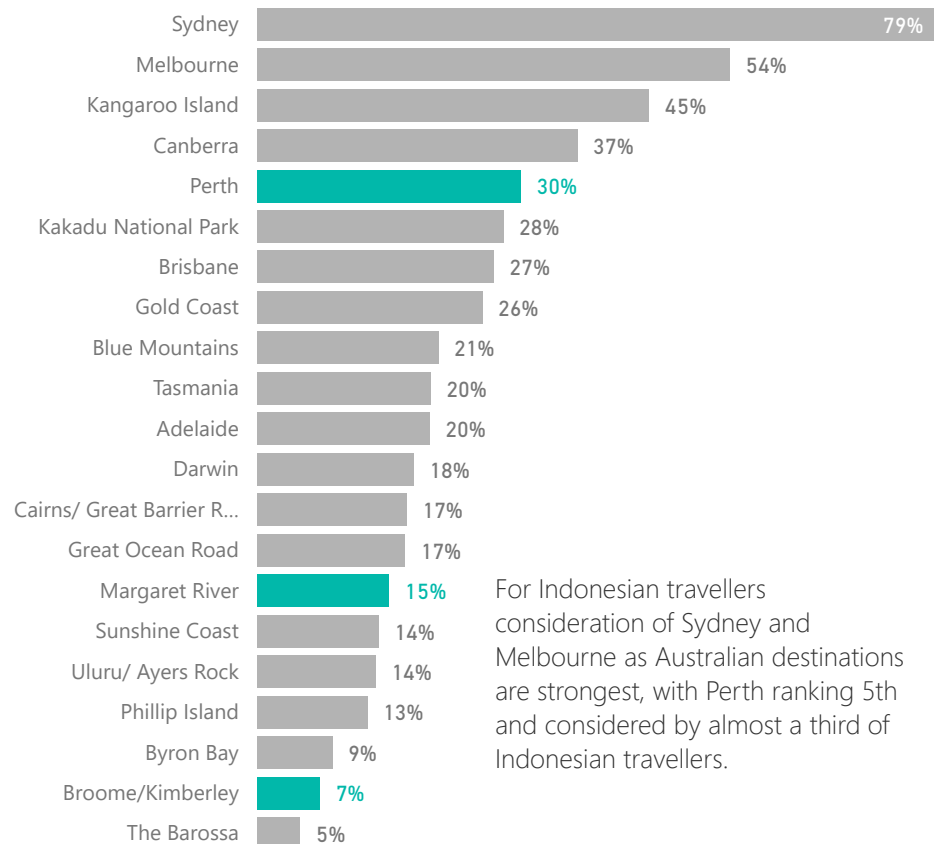
Out of region (OOR) travellers



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 and Melbourne as Australian destinations are strongest, with Perth ranking 5th and considered by almost a third of Indonesian travellers.

Which factors are most important when choosing a destination ⁵

- 1 A safe and secure destination 41%
- 2 Beautiful natural environments e.g. mountains, rivers, forests 39%
- 3 Value for money 31%
- 4 Easy to obtain an entry visa 29%
- 5 A family friendly destination 29%
- 6 Easy to get to (time & effort) 25%

Indonesian travellers state that they are looking for a safe and secure destination as well as beautiful natural environments for a holiday destination.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	50%	40%	16%	20%	9%	8%
A vibrant city lifestyle	66%	51%	20%	25%	5%	6%
Beautiful natural environments	21%	17%	10%	12%	19%	9%
Different and interesting local wildlife	14%	13%	6%	7%	9%	7%
Good food, wine/beverages	43%	39%	18%	20%	9%	9%
Interesting events and festivals	51%	38%	16%	21%	9%	8%
Value for money	50%	37%	17%	24%	11%	8%

Indonesian travellers most strongly associate Sydney with a vibrant city lifestyle. Margaret River is strongly associated with beautiful natural environments.

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NOTES & REFERENCES

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
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 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

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For more information, please contact: research@westernaustralia.com