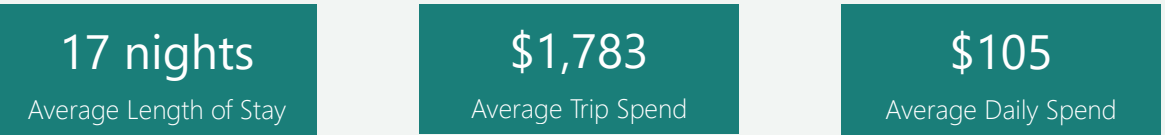


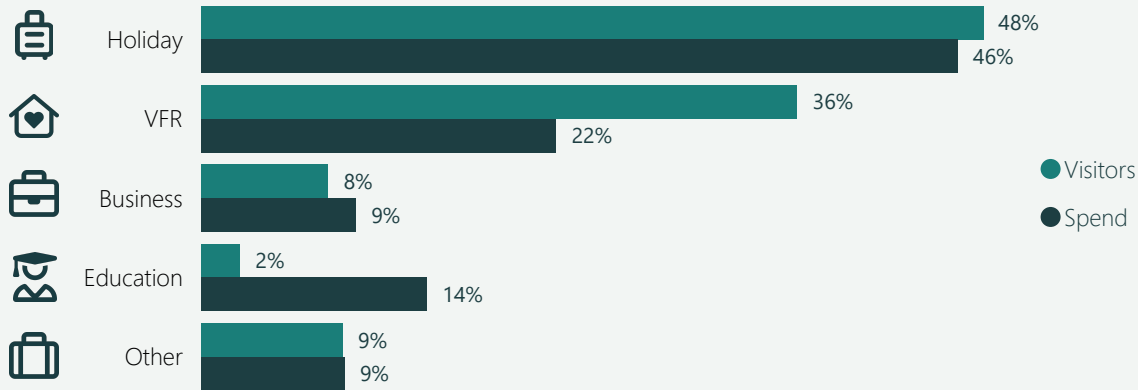
# INDONESIA | MARKET PROFILE 2024

## MARKET OVERVIEW

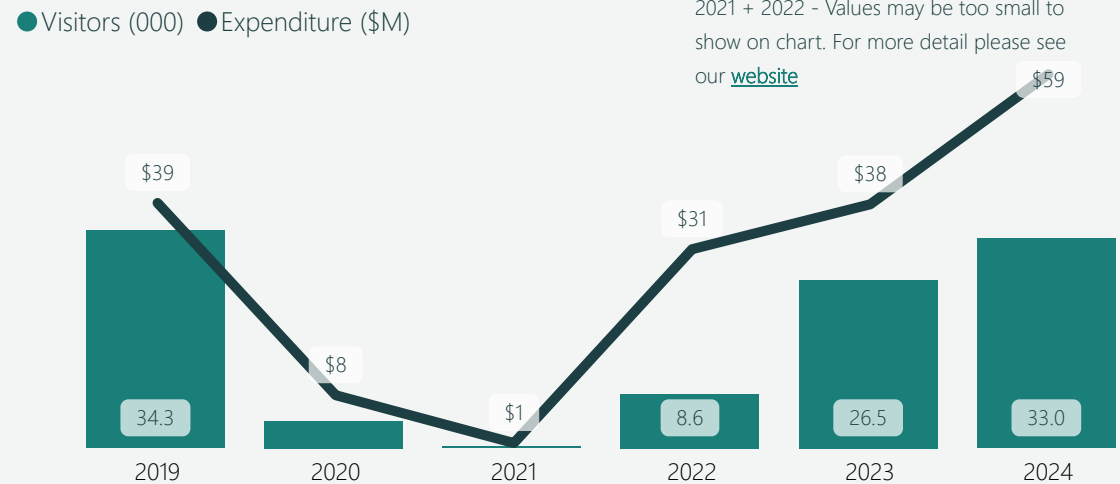
### Leisure Visitation to WA <sup>1</sup>



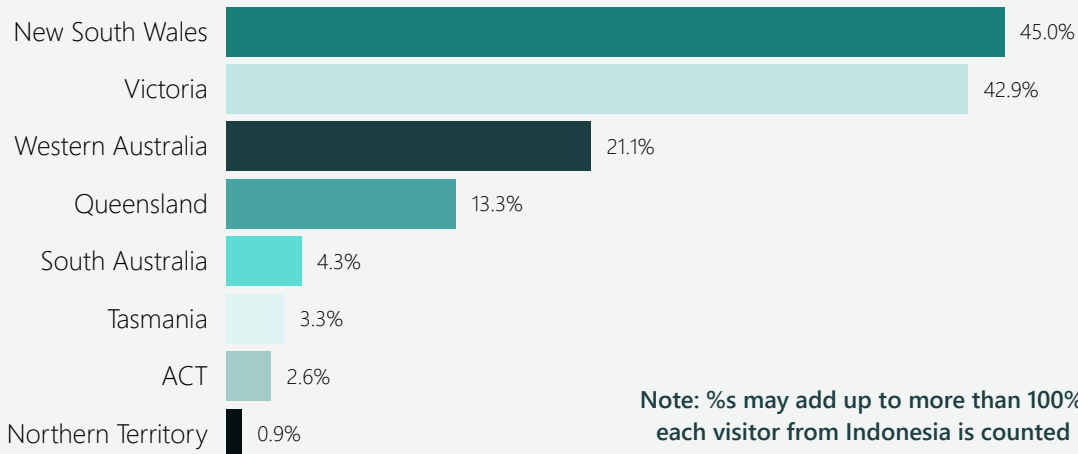
### International Visitors and Spend by Purpose (WA) <sup>1</sup>



### Leisure Visitation and Spend to WA <sup>2</sup>

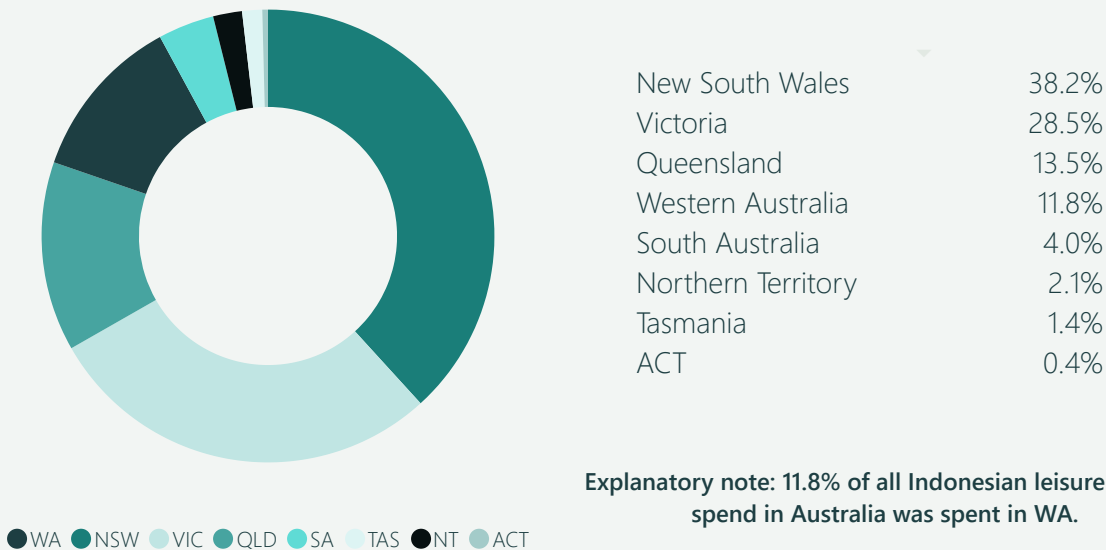


### Market Share of International Leisure Visitors to Australia <sup>1</sup>



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 Australia <sup>1</sup>



Explanatory note: 11.8% of all Indonesian leisure visitor spend in Australia was spent in WA.

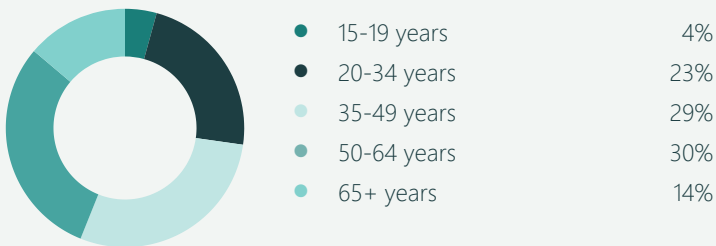
# INDONESIA | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

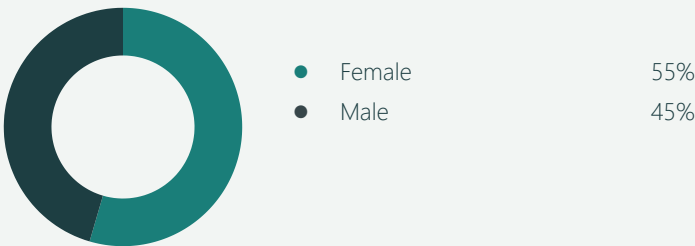
Seasonality - Short-term Leisure Visitor Arrivals to WA <sup>4</sup>



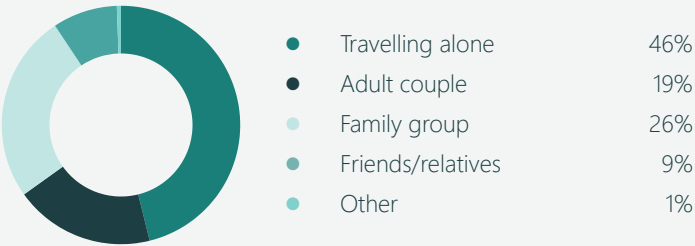
Age <sup>3</sup>



Gender <sup>3</sup>



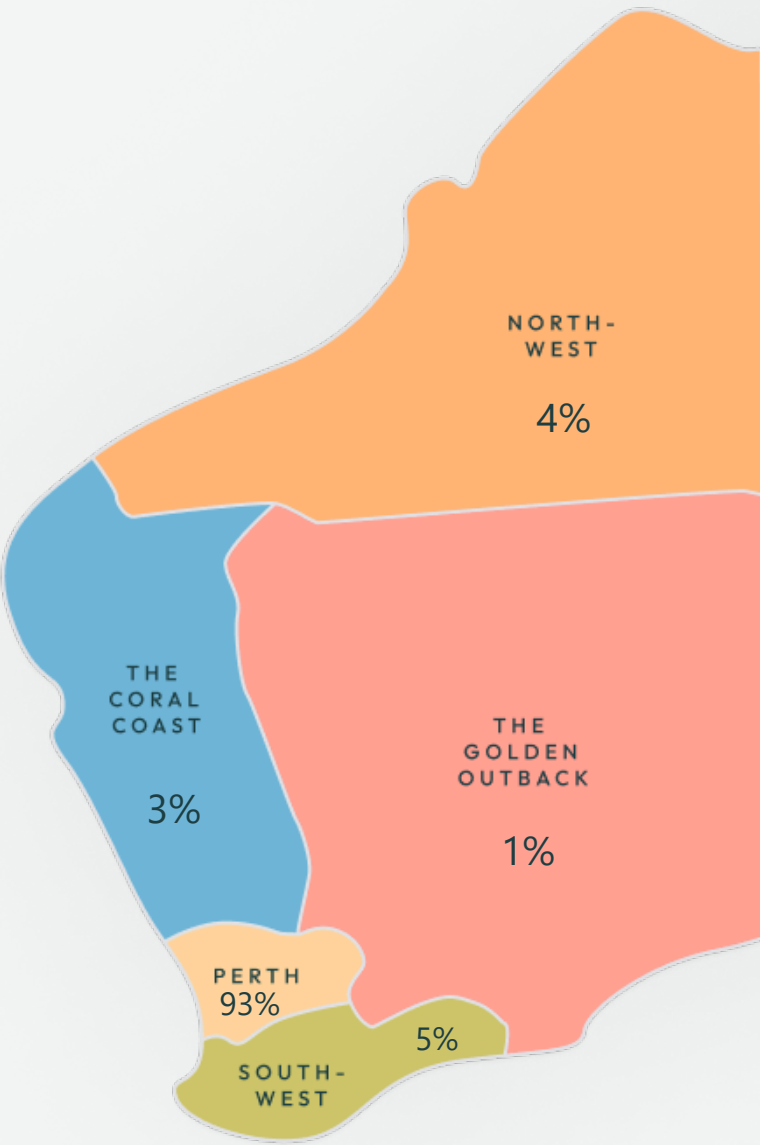
Travel Party <sup>3</sup>



Length of Trip <sup>3</sup>



Regional Dispersal <sup>3</sup>



# INDONESIA | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

## Top 5 Activities for Leisure Visitors to WA <sup>3</sup>

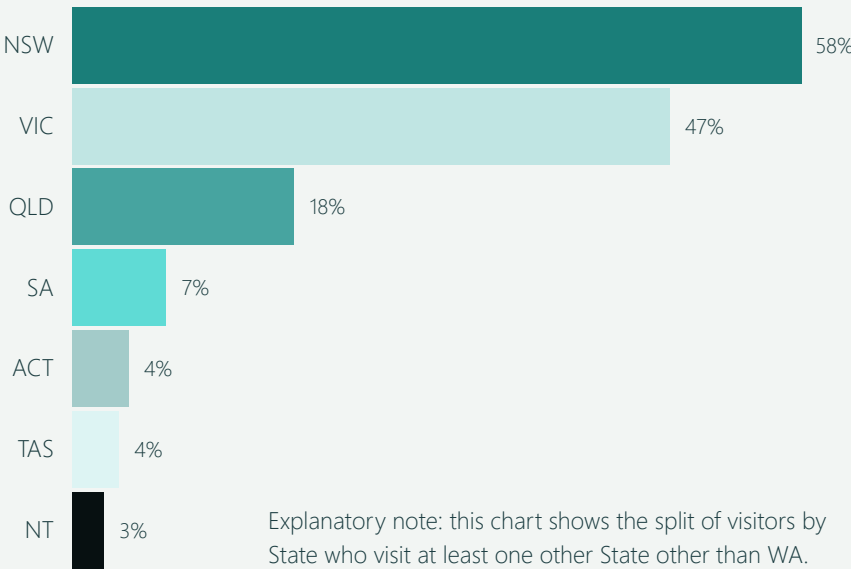
①	Eat out / dine at a restaurant and/or cafe	95%
②	Go shopping for pleasure	94%
③	Sightseeing/looking around	75%
④	Visit national parks / state parks	64%
⑤	Visit botanical or other public gardens	64%

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

## Top 3 Accommodation Choices for Leisure Visitors to WA <sup>3</sup>

①	Friends or relatives property	47%
②	Hotel/resort/motel or motor Inn	41%
③	Other commercial accommodation	8%

## Other States Visited <sup>3</sup>



## Number of States Visited <sup>3</sup>



## Group Tour v Free Independent Travellers (FIT) <sup>3</sup>

80% of Indonesian leisure visitors to WA are free independent travellers. 91% 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 <sup>3</sup>

79% of Indonesian leisure visitors to WA are on a return visit to Australia

## Travel Packages <sup>3</sup>

1% of Indonesian leisure visitors to WA arrived on a travel package

# INDONESIA | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

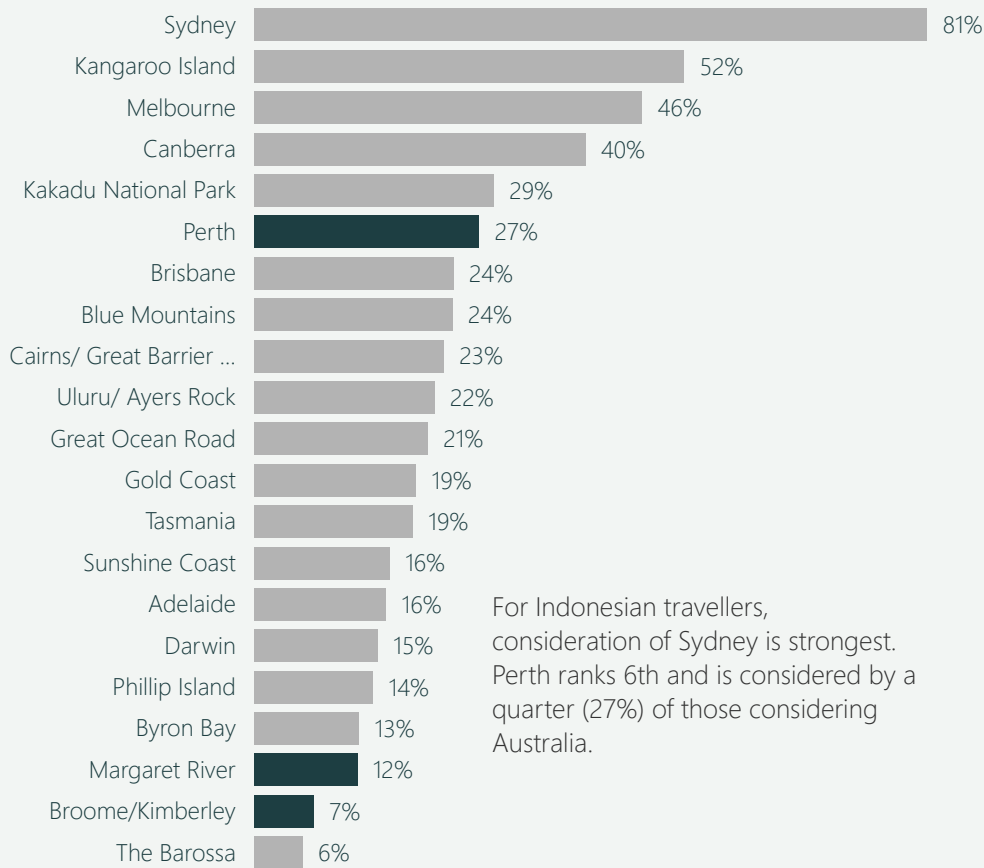
### Out of region (OOR) travellers



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 <sup>5</sup>

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



For Indonesian travellers, consideration of Sydney is strongest. Perth ranks 6th and is considered by a quarter (27%) of those considering Australia.

### Which factors are most important when choosing a destination <sup>5</sup>

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

Indonesian travellers seek destinations that are family friendly, and place more emphasis on this than the average traveller does.

### What OOR travellers associate with destinations <sup>5</sup>

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	46%	34%	13%	18%	10%	10%
A vibrant city lifestyle	59%	43%	18%	26%	8%	7%
Beautiful natural environments, including mountains, rivers, forests, beaches, and coastlines	23%	17%	11%	13%	20%	10%
Different and interesting local wildlife	17%	13%	7%	10%	8%	8%
Good food, wine/beverages, local cuisine and produce	42%	34%	18%	21%	10%	9%
Interesting events and festivals	47%	34%	13%	19%	9%	8%
Value for money	47%	34%	15%	21%	13%	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.

# INDONESIA | MARKET PROFILE

## 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 24
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 23/24
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 24
5. Tourism Australia – Consumer Demand Project, October - December 2024.

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