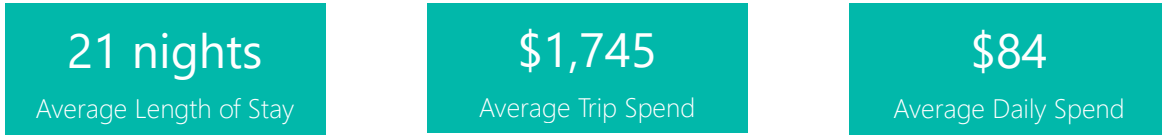


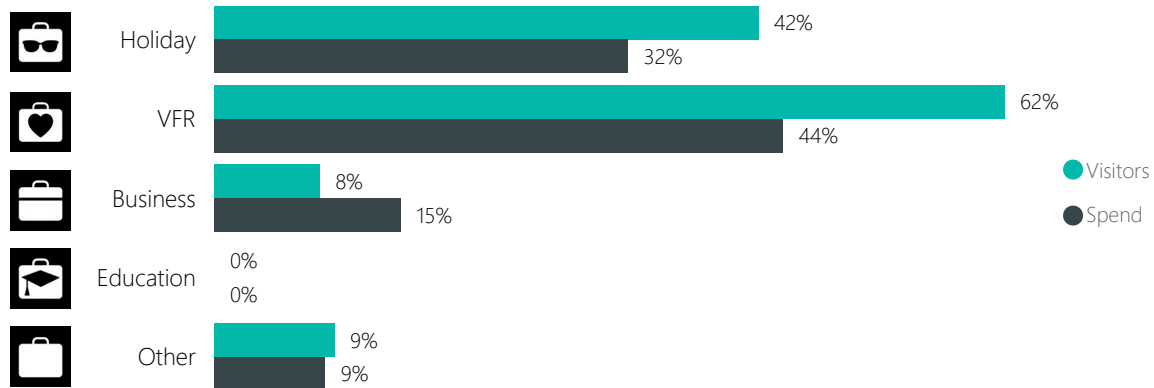
UNITED KINGDOM | MARKET PROFILE 2023

MARKET OVERVIEW

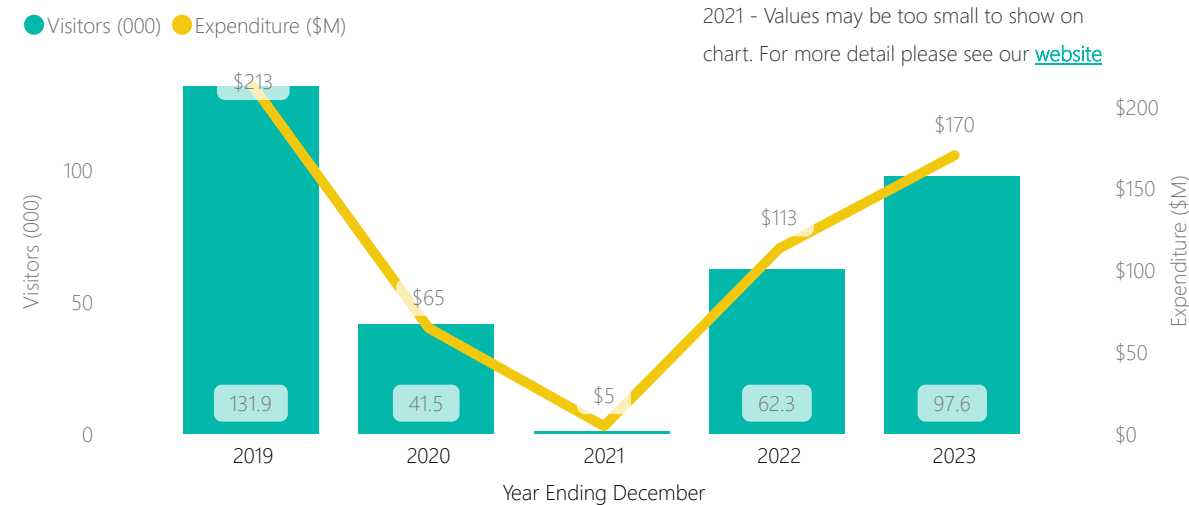
Leisure Visitation to WA¹



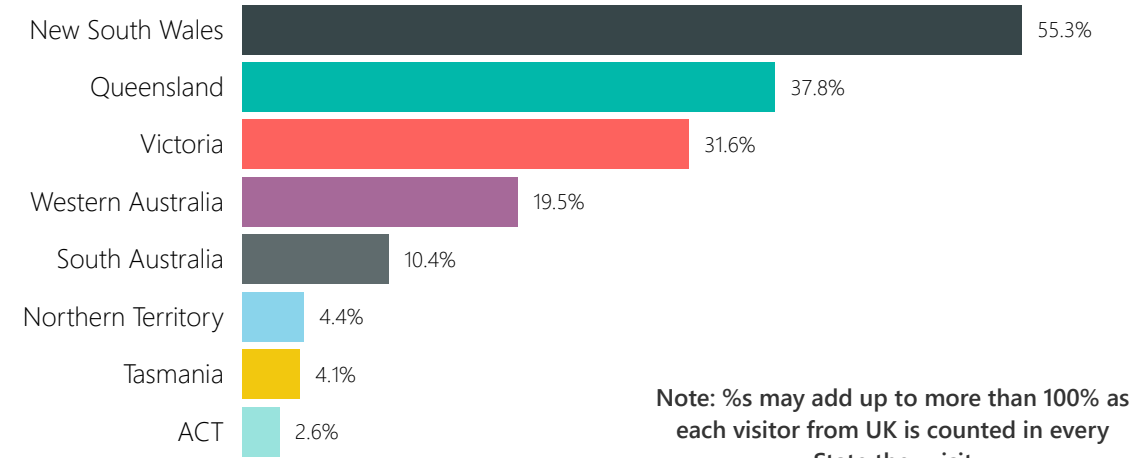
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

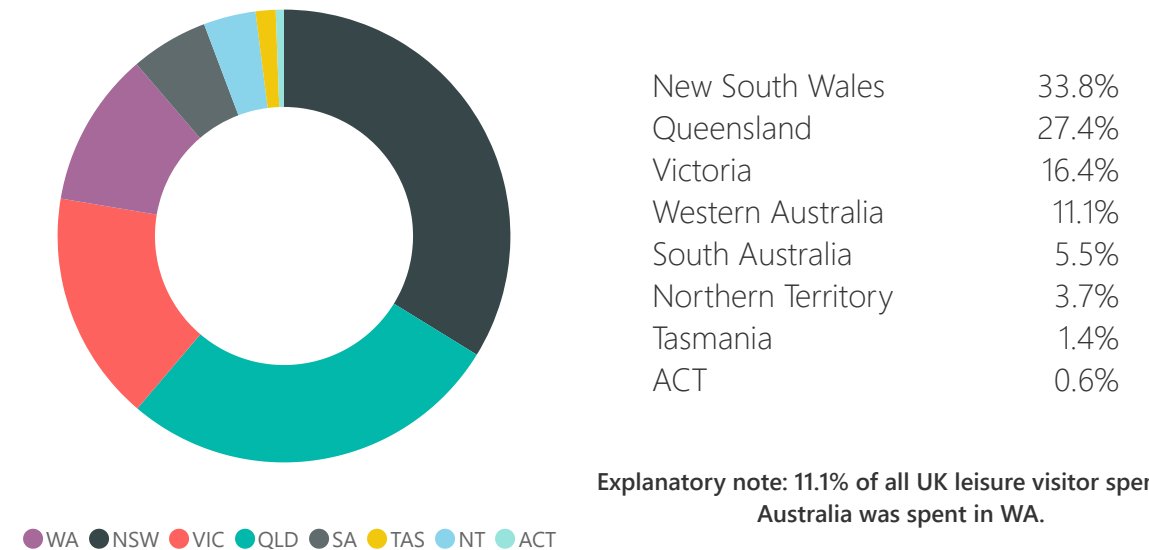


Market Share of International Leisure Visitors to Australia¹



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

Market Share of International Leisure Visitor Spend in Australia¹

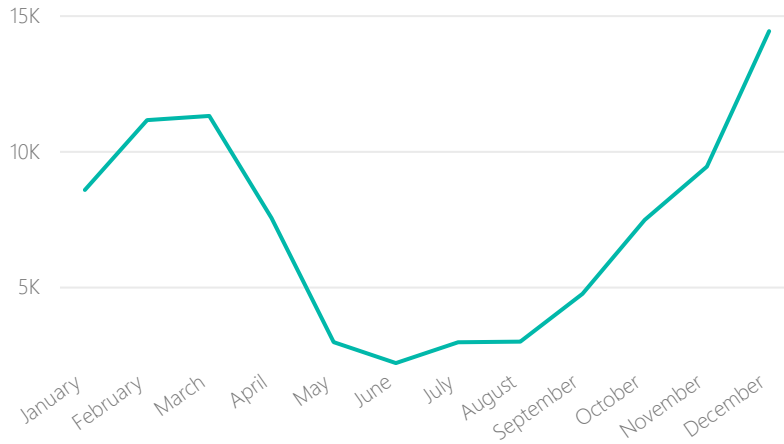


Explanatory note: 11.1% of all UK leisure visitor spend in Australia was spent in WA.

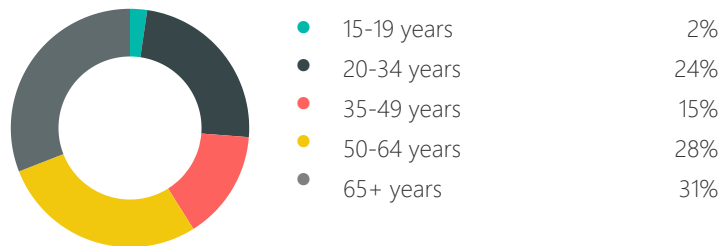
UNITED KINGDOM | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

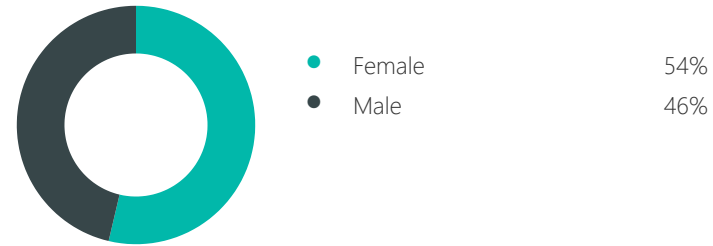
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



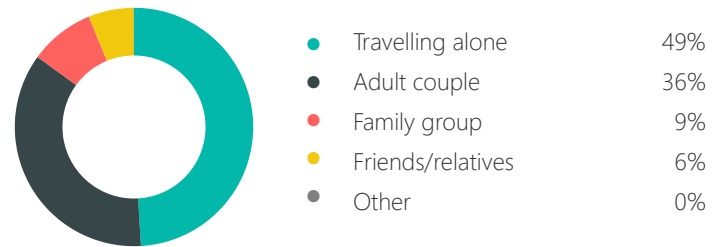
Age³



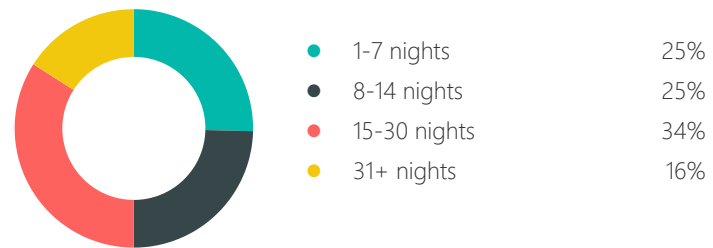
Gender³



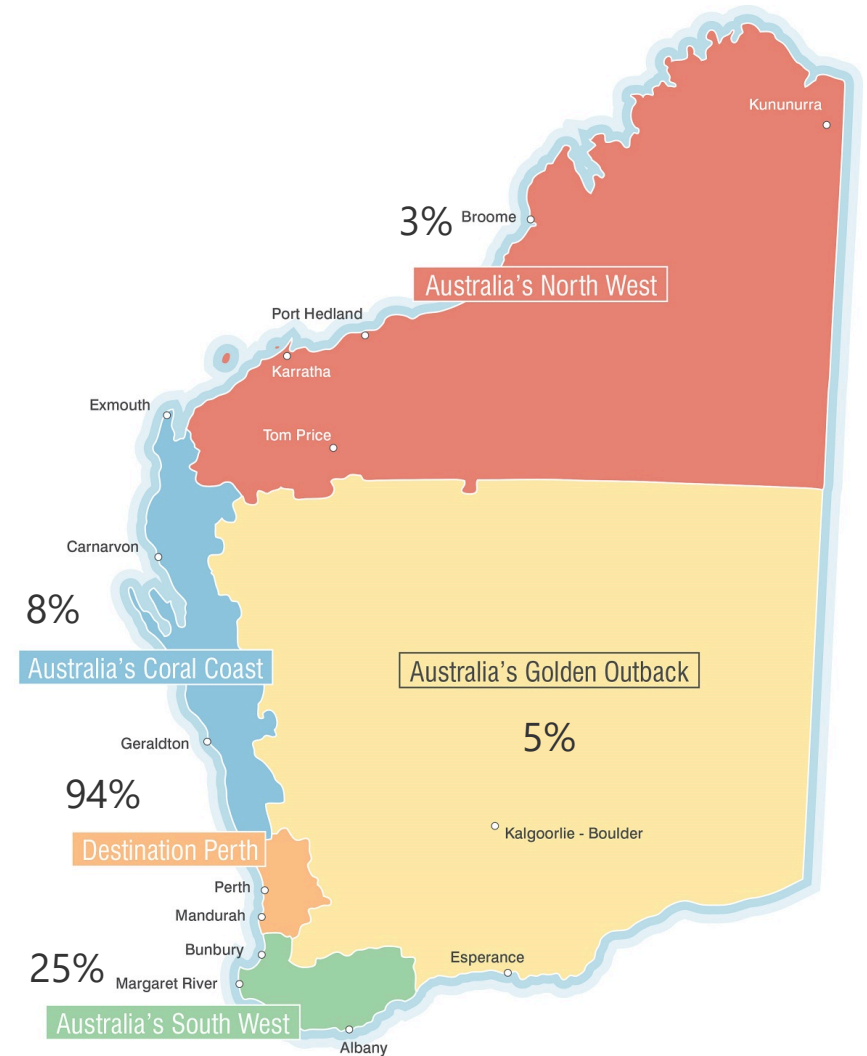
Travel Party³



Length of Trip³



Regional Dispersal³



UNITED KINGDOM | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

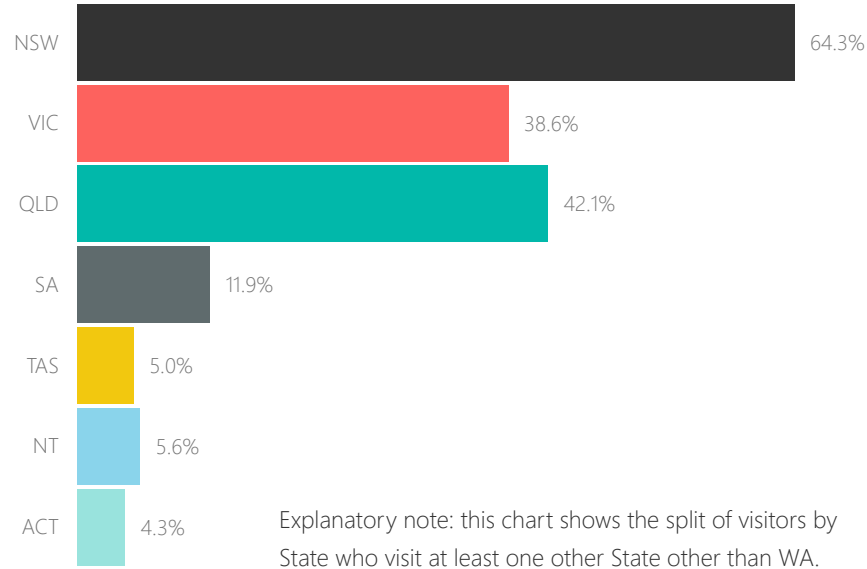
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 96% |
| ② | Go shopping for pleasure | 85% |
| ③ | Go to the beach | 84% |
| ④ | Sightseeing/looking around | 86% |
| ⑤ | Visit national parks / state parks | 69% |

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

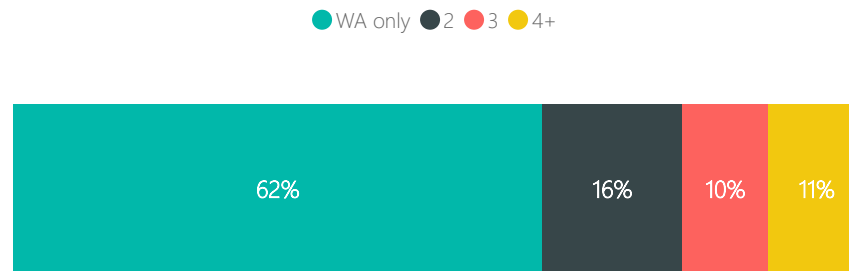
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| ① | Other Private Accommodation | 72% |
| ② | Friends or relatives property | 68% |
| ③ | Hotel/resort/motel or motor Inn | 36% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

98% of UK leisure visitors to WA are free independent travellers. Equally, 99% of UK 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

73% of UK leisure visitors to WA are on a return visit to Australia

Travel Packages³

10% of UK leisure visitors to WA arrived on a travel package

UNITED KINGDOM | MARKET PROFILE

IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

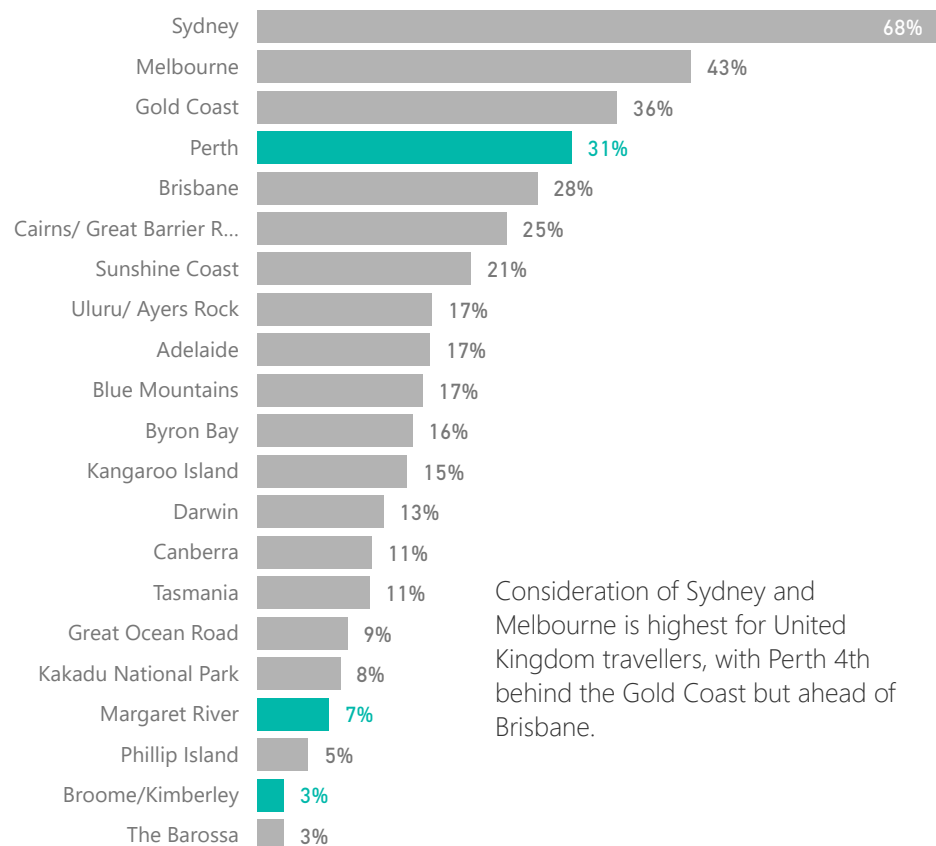
Out of region (OOR) travellers



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 ⁵

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



Consideration of Sydney and Melbourne is highest for United Kingdom travellers, with Perth 4th behind the Gold Coast but ahead of Brisbane.

Which factors are most important when choosing a destination ⁵

- 1 A safe and secure destination 43%
- 2 Appealing climate or weather 41%
- 3 Value for money 41%
- 4 Beautiful natural environments e.g. mountains, rivers, forests 26%
- 5 Good food, wine/beverages, local cuisine and produce 26%
- 6 A good range of accommodation options 23%

Appealing climate/weather, value for money & vibrant city lifestyle rank higher for United Kingdom travellers than the global aggregate as a holiday destination.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	42%	35%	23%	24%	7%	5%
A vibrant city lifestyle	65%	43%	26%	27%	3%	3%
Beautiful natural environments	17%	13%	10%	12%	18%	11%
Different and interesting local wildlife	13%	11%	8%	12%	9%	9%
Good food, wine/beverages	48%	36%	22%	24%	6%	6%
Interesting events and festivals	47%	31%	19%	19%	5%	5%
Value for money	24%	18%	12%	13%	5%	4%

Of the destinations listed, United Kingdom travellers associate Margaret River most strongly with beautiful natural environments, while Sydney and Melbourne lead remaining categories. Perth is above or in line with Brisbane in all categories.

UNITED KINGDOM | 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 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.

Published by Tourism WA, April 2024

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