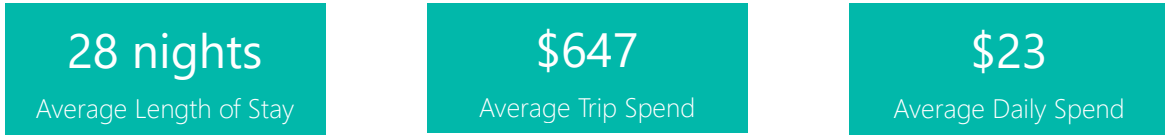


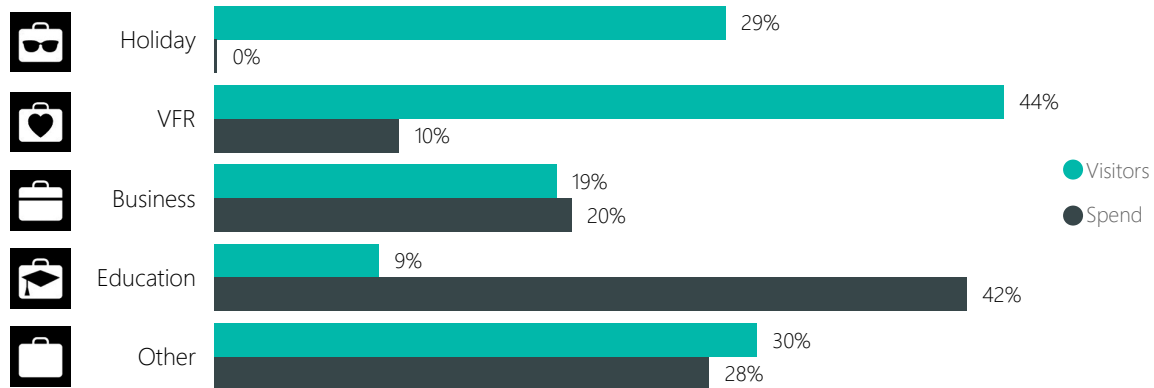
INDIA | MARKET PROFILE 2023

MARKET OVERVIEW

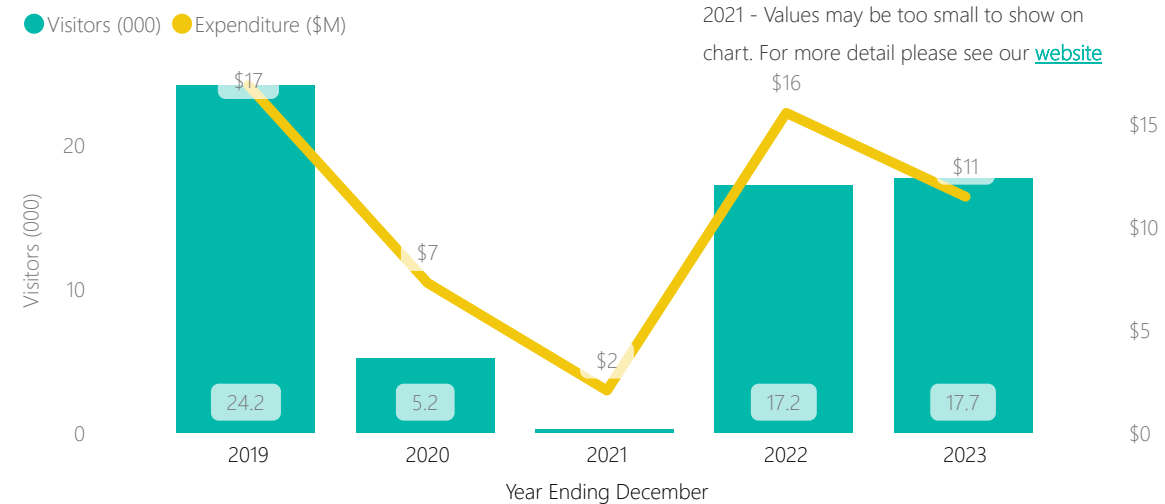
Leisure Visitation to WA¹



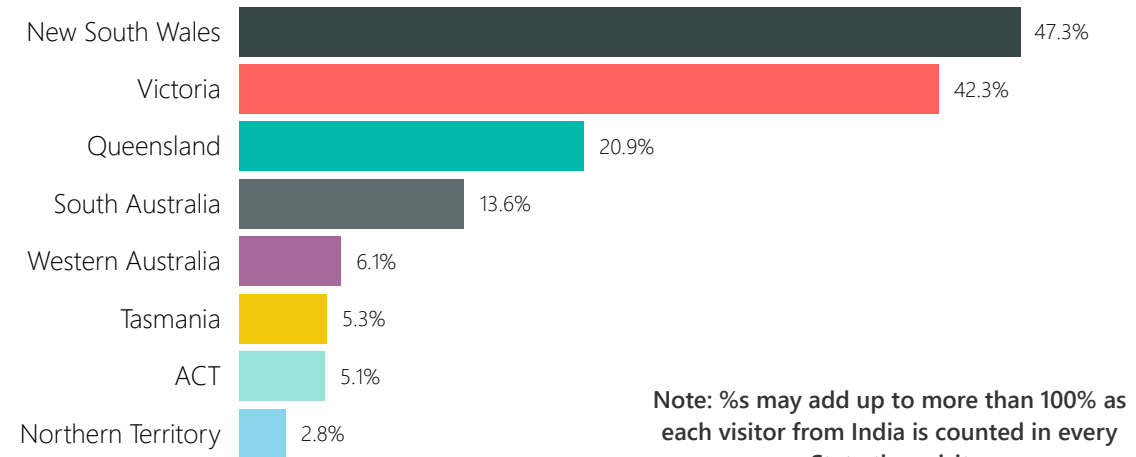
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

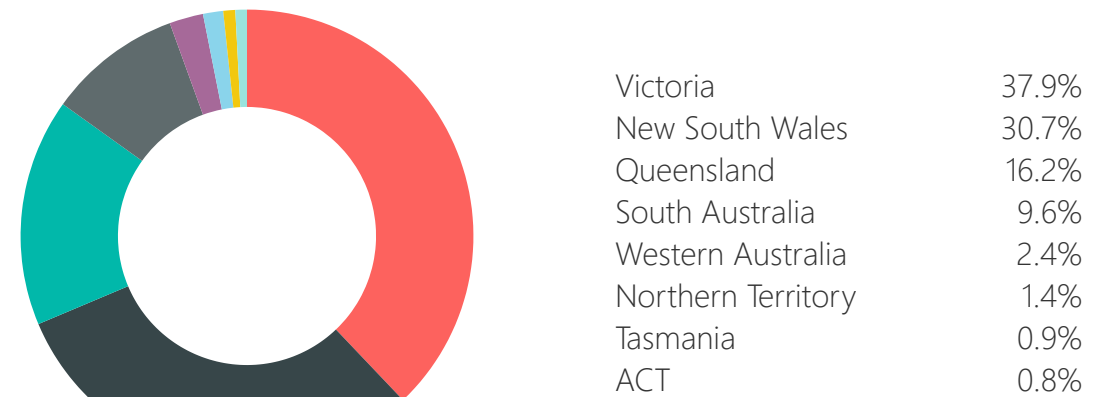


Market Share of International Leisure Visitors to Australia¹



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

Market Share of International Leisure Visitor Spend in Australia¹

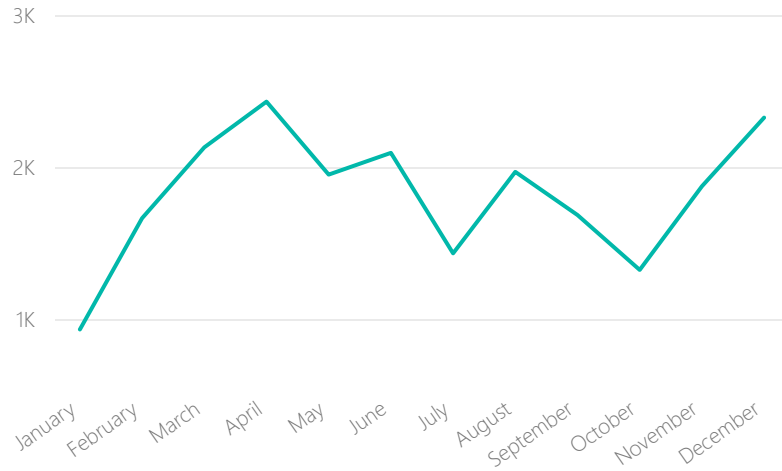


Explanatory note: 2.4% of all Indian leisure visitor spend in Australia was spent in WA.

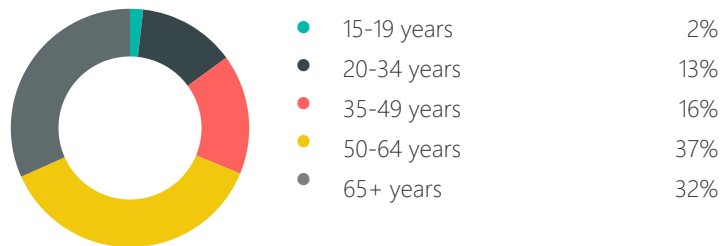
INDIA | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

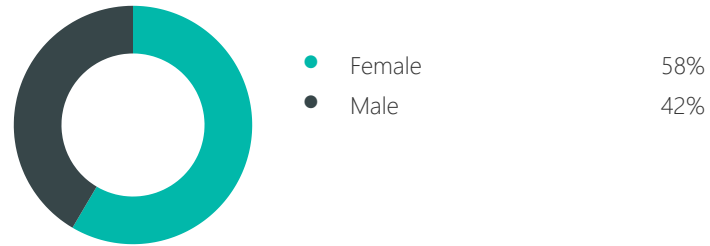
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



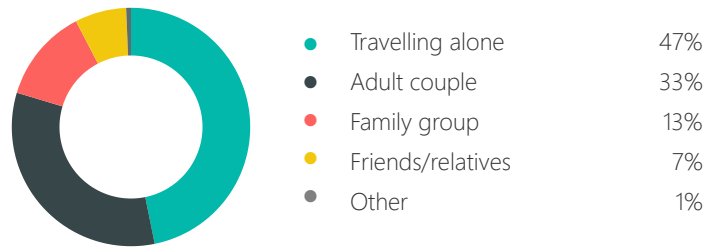
Age³



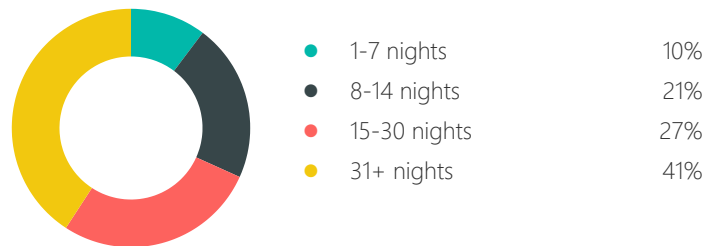
Gender³



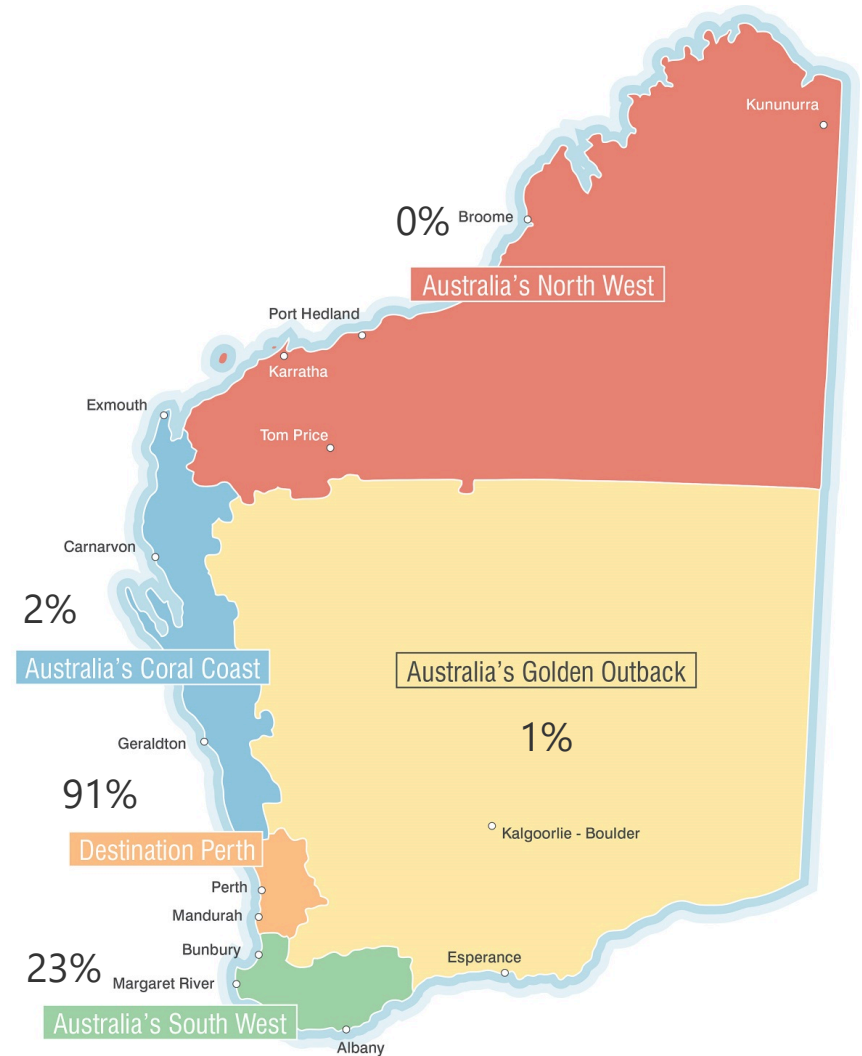
Travel Party³



Length of Trip³



Regional Dispersal³



INDIA | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

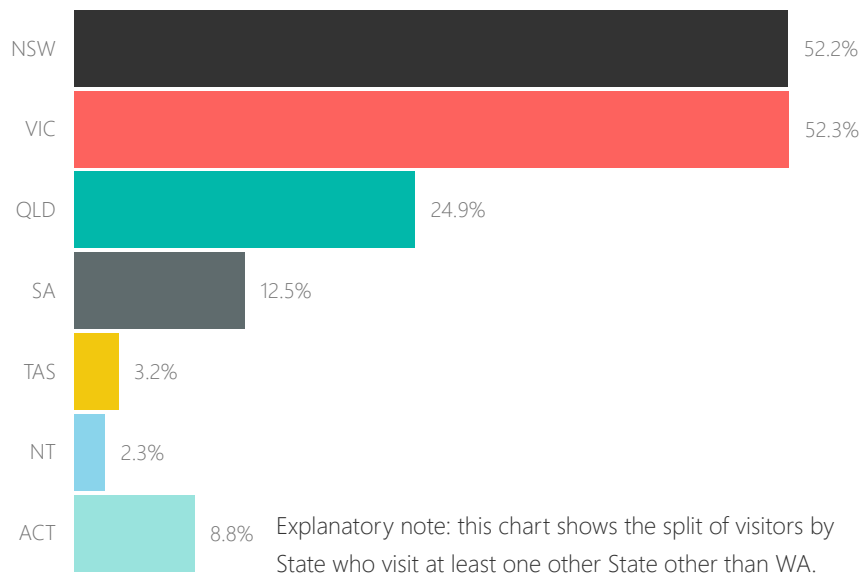
- | | | |
|---|--|-----|
| 1 | Eat out / dine at a restaurant and/or cafe | 90% |
| 2 | Go shopping for pleasure | 86% |
| 3 | Go to the beach | 77% |
| 4 | Sightseeing/looking around | 62% |
| 5 | Visit national parks / state parks | 70% |

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

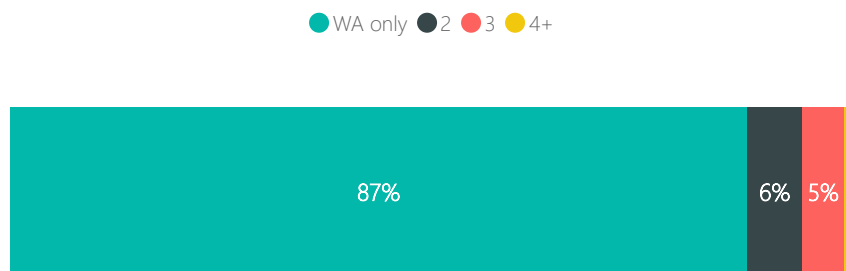
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| 1 | Other Private Accommodation | 80% |
| 2 | Friends or relatives property | 79% |
| 3 | Hotel/resort/motel or motor Inn | 24% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

99% of Indian leisure visitors to WA are free independent travellers. Equally, 96% 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 Visitors³

69% of Indian leisure visitors to WA are on a return visit to Australia

Travel Packages³

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

INDIA | MARKET PROFILE

IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

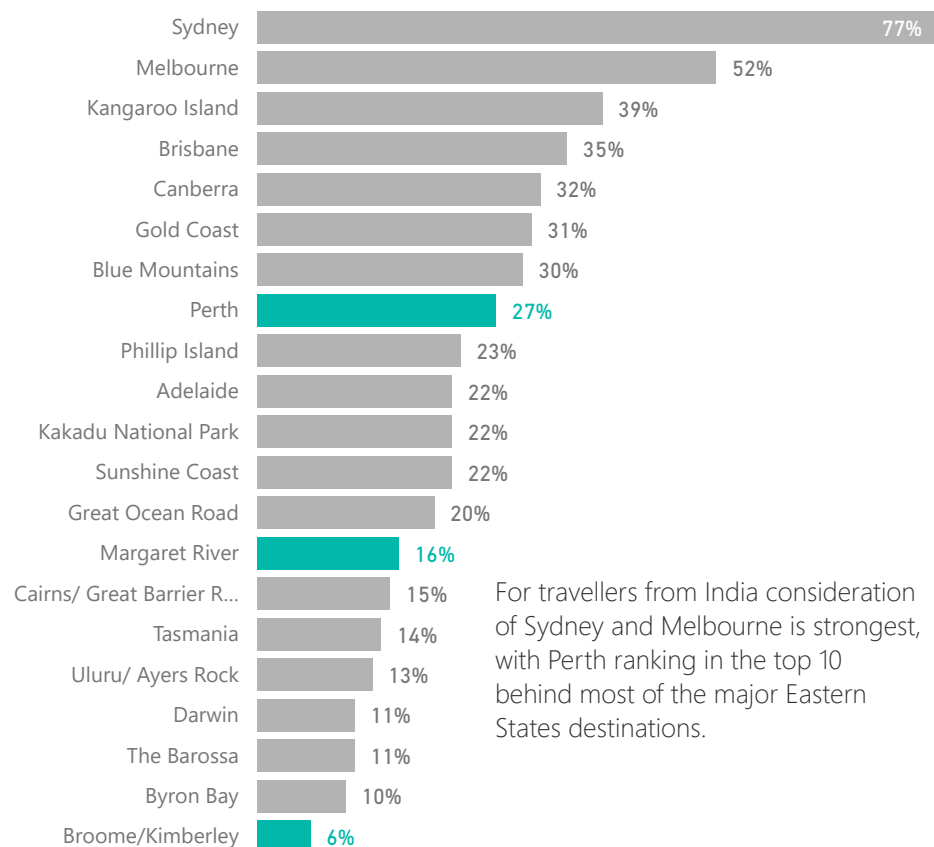
Out of region (OOR) travellers



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)



For travellers from India consideration of Sydney and Melbourne is strongest, with Perth ranking in the top 10 behind most of the major Eastern States destinations.

Which factors are most important when choosing a destination ⁵

- ① A safe and secure destination 43%
- ② Beautiful natural environments e.g. mountains, rivers, forests 33%
- ③ Value for money 32%
- ④ Natural wonders to explore e.g. world heritage sites 26%
- ⑤ World class beaches, coastlines, and marine wildlife 24%
- ⑥ Is unique and different to other destinations 24%

Indian travellers are looking for a safe and secure destination as well as beautiful natural environments and value for money when deciding upon a holiday destination.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	48%	44%	24%	24%	17%	12%
A vibrant city lifestyle	52%	47%	27%	25%	12%	12%
Beautiful natural environments	32%	25%	17%	17%	24%	15%
Different and interesting local wildlife	24%	22%	16%	14%	15%	13%
Good food, wine/beverages	46%	43%	26%	24%	14%	12%
Interesting events and festivals	45%	41%	21%	22%	14%	12%
Value for money	44%	38%	22%	22%	14%	12%

Indian travellers associate Sydney with a vibrant city lifestyle. Perth has similar associations to Brisbane and Margaret River performs well in terms of beautiful natural environments.

INDIA | 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