

INDIA | MARKET PROFILE 2018-19

MARKET OVERVIEW

INDIA LEISURE VISITATION TO WA¹

- **23,900** leisure visitors to WA
- WA's **11th largest** international market by leisure visitors
- **\$13.9 million** spent by leisure visitors in WA*
- Average daily spend: **\$11**
- Average length of stay: **53 nights**

VISITORS AND SPEND IN WA BY PURPOSE¹

Holiday



Visiting Friends and Relatives



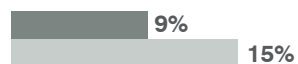
Business



Education



Other

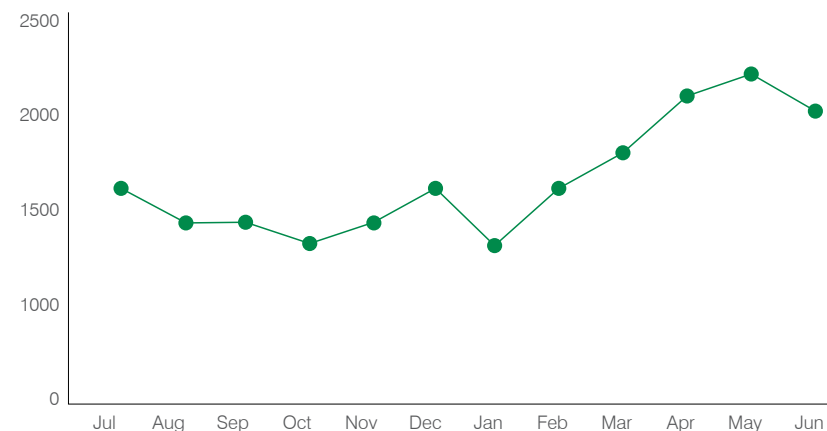


INDIA LEISURE VISITATION TO AUSTRALIA¹

- **266,600** leisure visitors to Australia
- Australia's **8th largest** international market by leisure visitors

SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA²

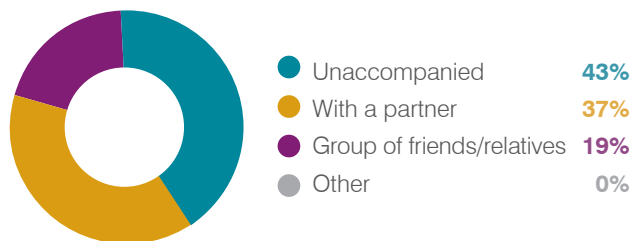
Arrivals traditionally peak around May at the start of school/university summer holidays, with a smaller peak in December.



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TRIP PROFILE

TRAVEL PARTY⁴

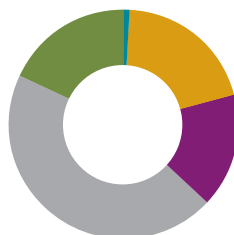


LEISURE VISITORS BY AGE⁴

WA

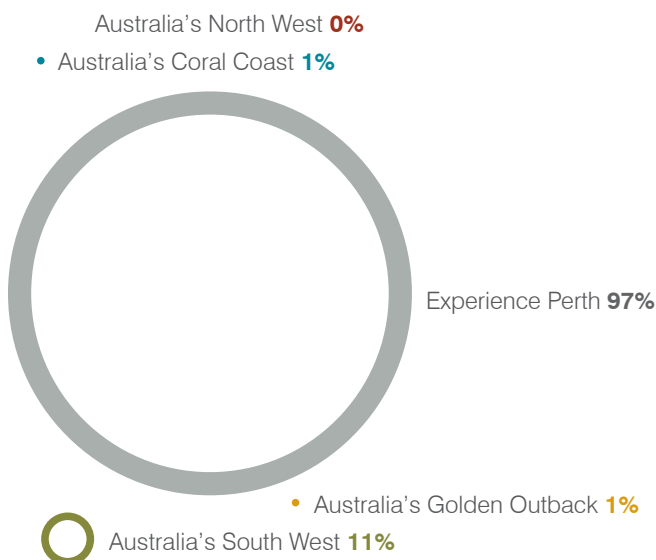


Australia



REGIONAL DISPERSAL⁴

An average **13%** of Indian leisure visitors to WA spend **at least one night in Regional WA**.



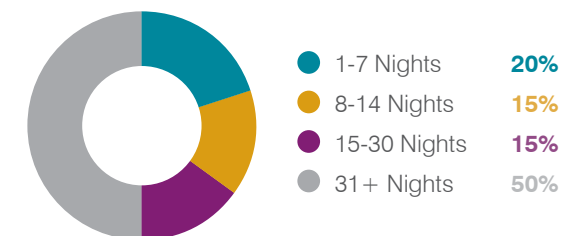
REPEAT VISITORS⁴

59% of Indian leisure visitors to WA are on a **return visit** to Australia.

OTHER STATES VISITED⁴

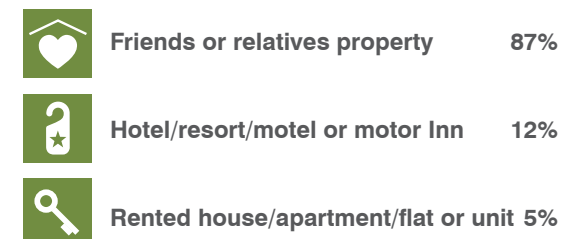
72% of Indian leisure visitors to WA **only visit WA** on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA⁴



TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA⁴

Proportion staying in this accommodation type (%)



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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

High Value Travellers (HVTs) are a new target audience for Tourism Western Australia.

DEFINITION OF A HIGH VALUE TRAVELLER



Travel Long Haul



Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences



Considering or intending to visit Australia.



Represent "high value": above average trip expenditure, and a higher likelihood to stay longer and disperse further

WHAT INDIAN HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY³



World class nature & wildlife



World class coastlines, beaches and marine wildlife



A safe and secure destination



Good food, wine, local cuisine and produce



Clean cities with good road infrastructure

HVTs BARRIERS TO VISITING AUSTRALIA³

Amongst Indian travellers, **cost** is a big barrier to visiting Australia – both the **on ground cost** and the initial **outlay for the airfare**. This highlights the importance of carefully considering the target audience in India, and **focusing efforts towards those who have the means** to travel to the country. **Competition from other countries** is also a barrier, highlighting the need for Australia to continue to leverage current positive perceptions and appeal to Indian travellers' interest in **nature, wildlife**, and **coastal** experiences.

Top 3 Barriers to visiting Australia



Planned a holiday to another destination



High cost of travelling around



Visa application process is too difficult

HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES⁵

Based on last out of region holiday

Based on their last holiday, Indian travelers tend to **decide on their holiday destination 1-6 months ahead of their trip** and **make their first booking around 1-2 months before** their trip.

HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING³

Inspiration



Online hotel booking site



Videos on internet



Online flights booking site



Online Travel agent



Traveller review sites

Booking



Flights
Travel website/app
Airline (online)
Travel agent (offline)



Activities
Travel website/App
Operator (online)
Travel agent (offline)



Accommodation
Travel website/app
Accomm. Provider (online)
Private accomm. Provider

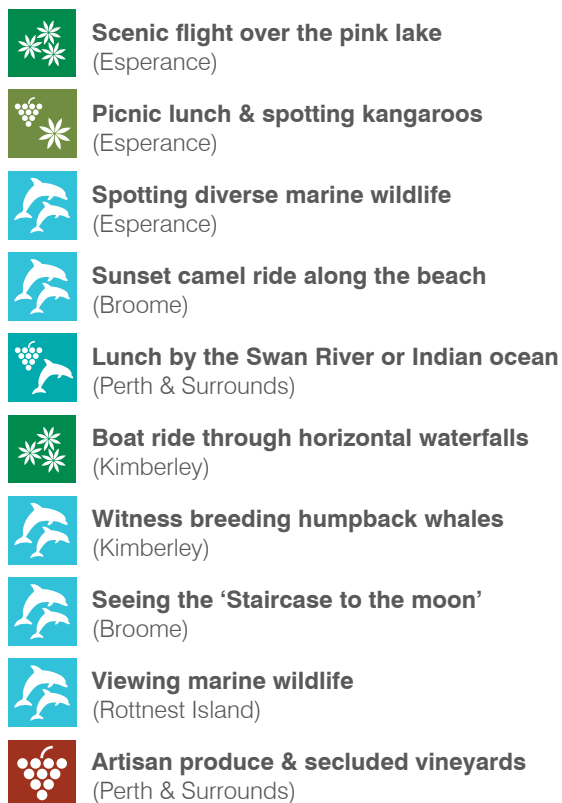
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APPEALING WA DESTINATIONS AND EXPERIENCES

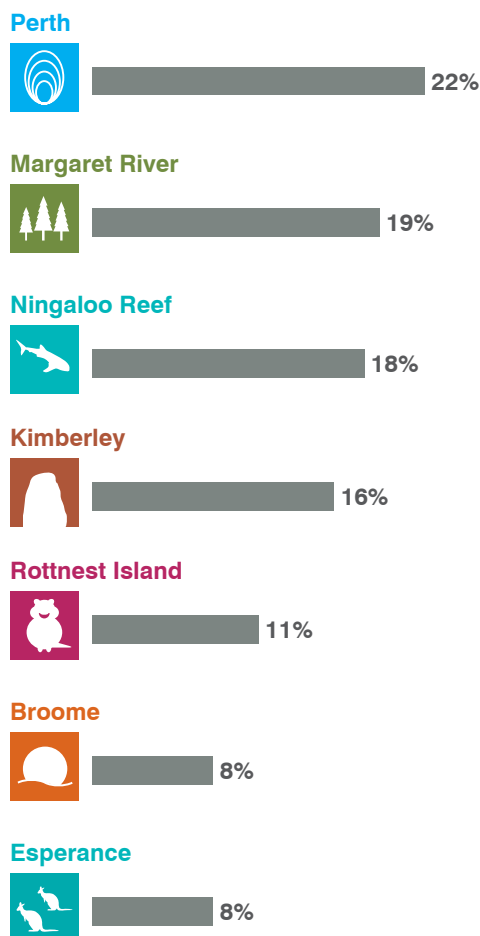
In research undertaken in 2018, **Indian HVTs** were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that **aquatic and coastal experiences** generate the highest appeal amongst Indian HVTs, **wildlife experiences** also feature. **Perth** is the preferred destination closely followed by **Margaret River** and **Ningaloo**.

MOST APPEALING EXPERIENCES⁵



MOST APPEALING DESTINATION⁵



WHY THESE DESTINATIONS AND EXPERIENCES APPEAL⁵

Perth & Surrounds

"It's the sunniest capital city. Its blend with urban cool and raw natural beauty, beautiful beaches and gardens there"

"Here we can see the different types of landscapes and cultural differences"

Margaret River

"Its craft breweries, boutiques and surrounding wineries. Beaches and surf breaks line the nearby coast"

Ningaloo Reef

"I love reefs and I love snorkeling. The blue water and stunning scenic beauty makes it the best option"

Notes

* Expenditure excludes pre-paid package spend.

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

References

1. Tourism Research Australia – International Visitor Survey, YE Jun 19
2. 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 Jun 19
3. Tourism Australia – Consumer Demand Project 2019 India Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Jun 2017/18/19)
5. BDA – International High Value Travellers - Western Australia State Report, 2019

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