

INDONESIA | MARKET PROFILE 2018-19

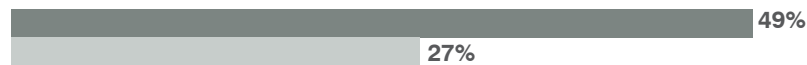
MARKET OVERVIEW

INDONESIA LEISURE VISITATION TO WA¹

- **29,100** leisure visitors to WA
- WA's **8th largest** international market by leisure visitors
- **\$34.8 million** spent by leisure visitors in WA*
- Average daily spend: **\$83**
- Average length of stay: **14 nights**

VISITORS AND SPEND IN WA BY PURPOSE¹

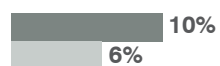
Holiday



Visiting Friends and Relatives



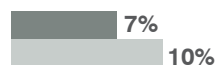
Business



Education



Other

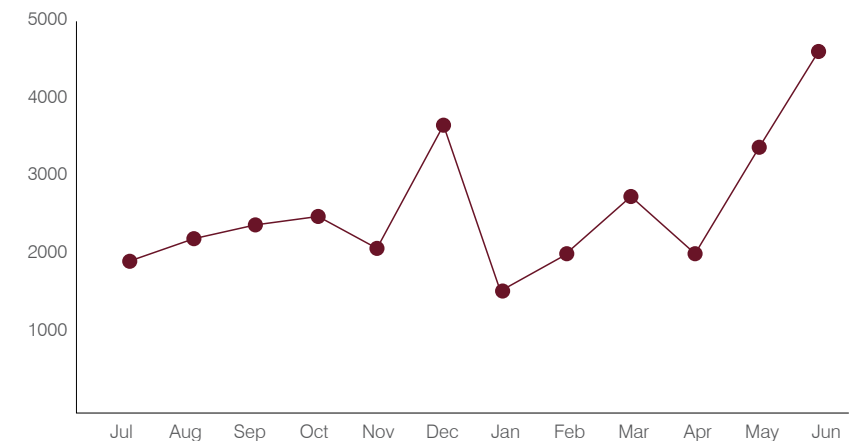


INDONESIA LEISURE VISITATION TO AUSTRALIA¹

- **151,300** leisure visitors to Australia
- Australia's **13th largest** international market by leisure visitors

SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA²

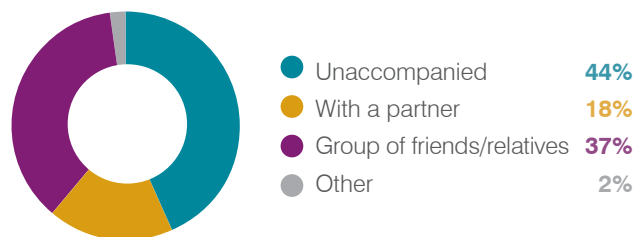
Arrivals peaked around the Christmas holiday and Eid al-Fitr periods.



INDONESIA | MARKET PROFILE 2018-19

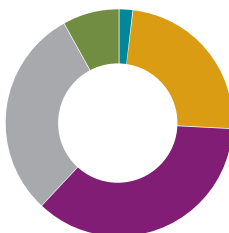
TRIP PROFILE

TRAVEL PARTY⁴

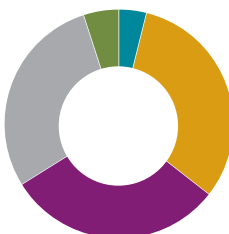


LEISURE VISITORS BY AGE⁴

WA

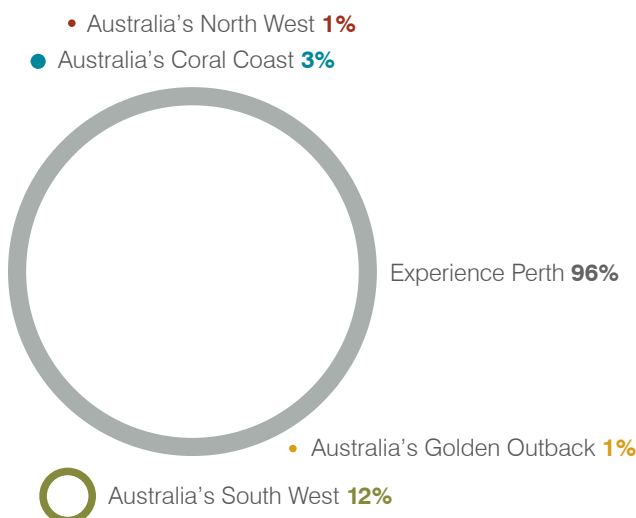


Australia



REGIONAL DISPERSAL⁴

An average of **15%** of Indonesian leisure visitors to WA spend **at least one night in Regional WA**.



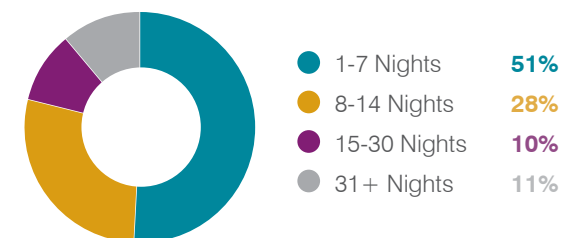
REPEAT VISITORS⁴

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

OTHER STATES VISITED⁴

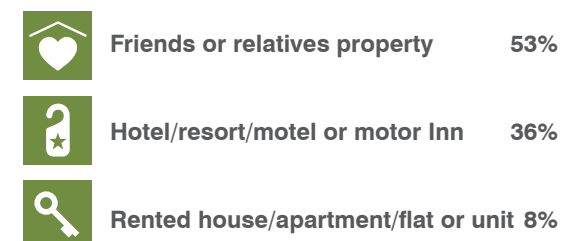
Nine in ten (88%) of Indonesian leisure visitors to WA **only visit WA** on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA⁴



TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA⁴

Proportion staying in this accommodation type (%)



INDONESIA | MARKET PROFILE 2018-19

TRIP PROFILE

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 INDONESIAN HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY³



World class nature & wildlife



A safe and secure destination



Good food, wine, local cuisine and produce



Clean cities, good road infrastructure, clear signposts



World class coastlines, beaches and marine wildlife

HVTs BARRIERS TO VISITING AUSTRALIA³

There are a number of factors working simultaneously to prevent Indonesian HVTs visiting Australia. **Cost** is the biggest barrier (due to on-the-ground cost, cost of visa, exchange rate and airfares). **Competition from other destinations** and the **visa application process** are also significant barriers. WA's unique and affordable **nature/wildlife/aquatic experiences** are likely to be compelling to this market, and further promotion of these affordable experiences is likely to make WA more competitive as a holiday destination.

Top 3 Barriers to visiting Australia



High cost of travelling around



Visas are too expensive



Planned a holiday to another destination

HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES⁵

Based on last out of region holiday

Based on their last holiday, Indonesian HVTs tend to decide on their holiday destination around **1-2 months before their trip** and make their first booking later, **up to just one week before travel**.

HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING³

Inspiration



Videos on internet



Social media



Traveller review sites



General internet searching



Sites for specific dest'ns in a country

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

INDONESIA | MARKET PROFILE 2018-19

APPEALING WA DESTINATIONS AND EXPERIENCES

In research undertaken in 2018, **Indonesian 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 **Perth** is the most preferred destination, followed by **Broome** and **Margaret River**. A combination of experiences appeal including **aquatic, nature / wildlife, food and wine and city**.

MOST APPEALING EXPERIENCES⁵



Visiting beautiful beaches & secluded coves (Margaret River)



Scenic flight over the pink lake (Esperance)



Discovering untouched islands & beaches by boat (Esperance)



Snorkelling in the reef (Ningaloo Reef)



Artisan produce & secluded vineyards (Perth & Surrounds)



Lunch by the Swan River or Indian ocean (Perth & Surrounds)



Exploring eclectic Fremantle (Perth & Surrounds)



Picnic lunch & spotting kangaroos (Esperance)



Seeing the 'Staircase to the moon' (Broome)



Spotting diverse marine wildlife (Esperance)

MOST APPEALING DESTINATION⁵

Perth



29%

Broome



18%

Margaret River



17%

Rottneet Island



11%

Kimberley



10%

Ningaloo Reef



8%

Esperance



7%

WHY THESE DESTINATIONS AND EXPERIENCES APPEAL⁵

Perth & Surrounds

"City with experience enjoying local sights and culinary"

"Blend the atmosphere of the city and experience its natural scenery"

Broome

"Enjoying a camel riding experience accompanied by sunset is one of the unique experiences on vacation"

Margaret River

"Globally known for wine, beaches, and the sensation of adventure"

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 Indonesia 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

Published by Tourism WA, 2020
For more information,
please contact:
research@westernaustralia.com