

# USA | MARKET PROFILE 2018-19

## MARKET OVERVIEW

### US LEISURE VISITATION TO WA<sup>1</sup>

- **48,000** leisure visitors to WA
- WA's **6th largest** international market by leisure visitors
- **\$76.1 million** spent by leisure visitors in WA\*
- Average daily spend: **\$91**
- Average length of stay: **17 nights**

### VISITORS AND SPEND IN WA BY PURPOSE<sup>1</sup>

#### Holiday



#### Visiting Friends and Relatives



#### Business



#### Education



#### Other



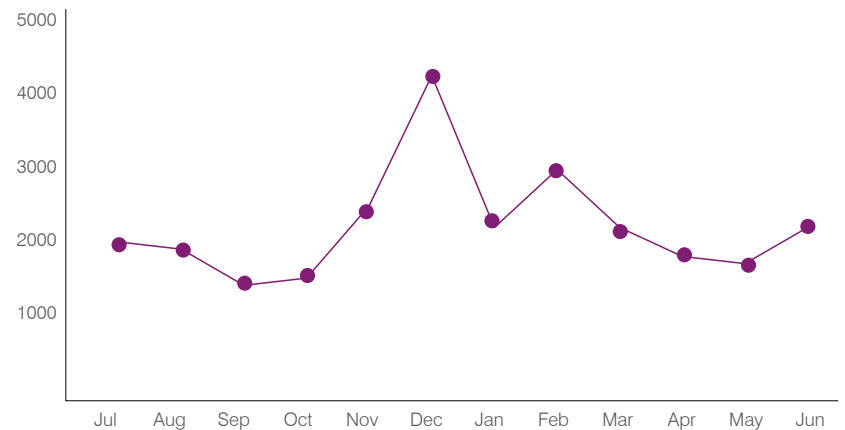
### US LEISURE VISITATION TO AUSTRALIA<sup>1</sup>

- **568,000** leisure visitors to Australia
- Australia's **4th largest** international market by leisure visitors

### SEASONALITY

#### - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA<sup>2</sup>

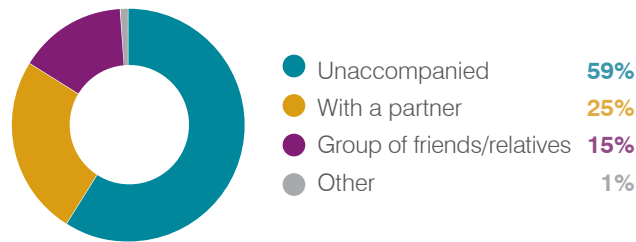
Arrivals peaked around the Christmas holiday period.



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## TRIP PROFILE

### TRAVEL PARTY<sup>4</sup>



### LEISURE VISITORS BY AGE<sup>4</sup>

#### WA

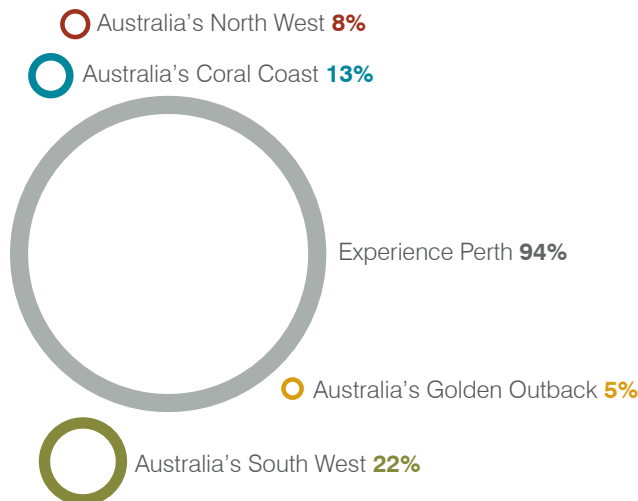


#### Australia



### REGIONAL DISPERSAL<sup>4</sup>

On average **one third** (35%) USA leisure visitors to WA spend **at least one night in Regional WA**.



### TRAVEL PACKAGES<sup>4</sup>

**Nearly one in ten (9%)** US leisure visitors to WA arrived on a **travel package**

*(i.e. paid for their flight to Australia and at least one other component of their trip as one packaged price).*

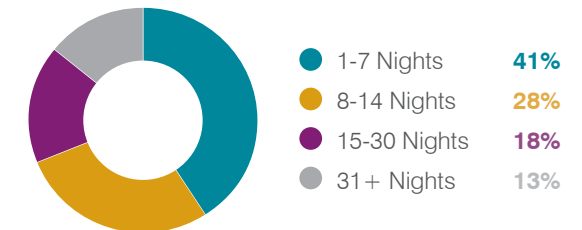
### REPEAT VISITORS<sup>4</sup>

**57%** of US leisure visitors to WA are on a **return visit** to Australia.

### OTHER STATES VISITED<sup>4</sup>

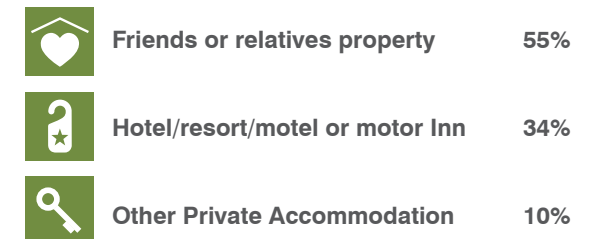
**55%** of US leisure visitors to WA **only visit WA** on their trip.

### LENGTH OF STAY – LEISURE VISITORS TO WA<sup>4</sup>



### TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA<sup>4</sup>

Proportion staying in this accommodation type (%)



**10%** of US visitors to WA caravan or camp, equivalent to an average of **5,900** US visitors a year<sup>4^</sup>

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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 USA HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY<sup>3</sup>



World class nature & wildlife



A safe and secure destination



Good food, wine, local cuisine and produce



World class coastlines, beaches and marine wildlife



Friendly and open citizens, local hospitality

### HVTs BARRIERS TO VISITING AUSTRALIA<sup>3</sup>

Amongst USA HVTs, **cost** is the biggest barrier to visiting Australia – both the initial outlay for the airfare as well as on ground cost.

**Geography** is also a barrier, with quarter claiming it is just too far to travel. WA's unique and affordable **nature/wildlife/aquatic experiences** are likely to be compelling to this market, and further promotion of these experiences is likely to make WA more competitive as a holiday destination.

#### Top 3 Barriers to visiting Australia



Expensive airfares



It is too far to travel



High cost of travelling around

### HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES<sup>5</sup>

Based on last out of region holiday

Based on their last holiday, US HVTs tend to decide on their holiday destination and make their first booking around **3-6 months** before their trip.

### HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING<sup>3</sup>

#### Inspiration



Travel/guide books



Online hotel booking site



General internet searching



Talking to F&R



Traveller review sites

#### Booking



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



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



**Accommodation**  
Travel website/app  
Accomm. Provider (online)  
Travel agent (offline)

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## APPEALING WA DESTINATIONS AND EXPERIENCES

In research undertaken in 2018, **USA 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 preferred followed by **Ningaloo** and **Rottnest**. **Aquatic and natural experiences** dominate the most appealing experiences whilst **nature** and **food & wine** experiences also appeal.

### MOST APPEALING EXPERIENCES<sup>5</sup>



**Spotting diverse marine wildlife**  
(Esperance)



**Boat ride through horizontal waterfalls**  
(Kimberley)



**Discovering untouched islands & beaches by boat** (Esperance)



**Cruising along the untouched coast**  
(Kimberley)



**Witness breeding humpback whales**  
(Kimberley)



**Picnic lunch & spotting kangaroos**  
(Esperance)



**Visiting beautiful beaches & secluded coves** (Margaret River)



**Viewing marine wildlife**  
(Rottnest Island)



**Sunset camel ride along the beach**  
(Broome)



**Exploring limestone caves**  
(Margaret River)

### MOST APPEALING DESTINATION<sup>5</sup>

**Perth**



26%

**Ningaloo Reef**



18%

**Rottnest Island**



15%

**Broome**



13%

**Kimberley**



11%

**Margaret River**



10%

**Esperance**



6%

### WHY THESE DESTINATIONS AND EXPERIENCES APPEAL<sup>5</sup>

#### Perth & Surrounds

*"Have always wanted to visit Perth; beautiful beaches, marine life, city lights, natural wonders"*

*"It seems like there is a lot to do there without having to travel very far. Also, I like the idea of it being a city, but also a beach town"*

#### Ningaloo Reef

*"The beauty and amount of things I can do there both in the water and out is amazing"*

#### Rottnest Island

*"The time by the sea is most relaxing for me and I enjoy seeing the wildlife"*

### Notes

\* Expenditure excludes pre-paid package spend.

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

^ 'Caravan and camping visitors' spent at least one night in commercial or non-commercial caravan or camping accommodation while on their trip.

### 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 USA 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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