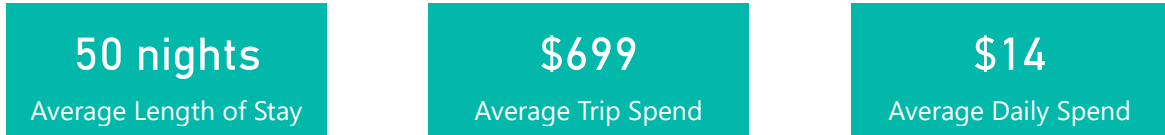


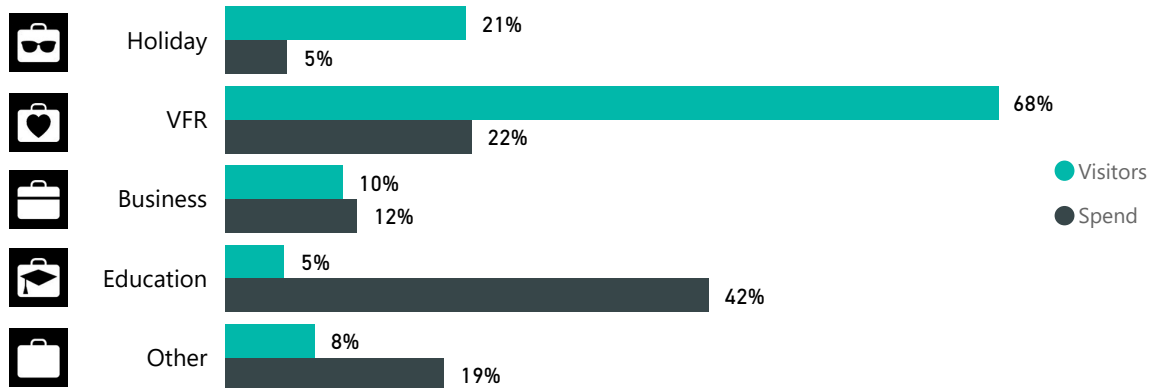
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MARKET OVERVIEW

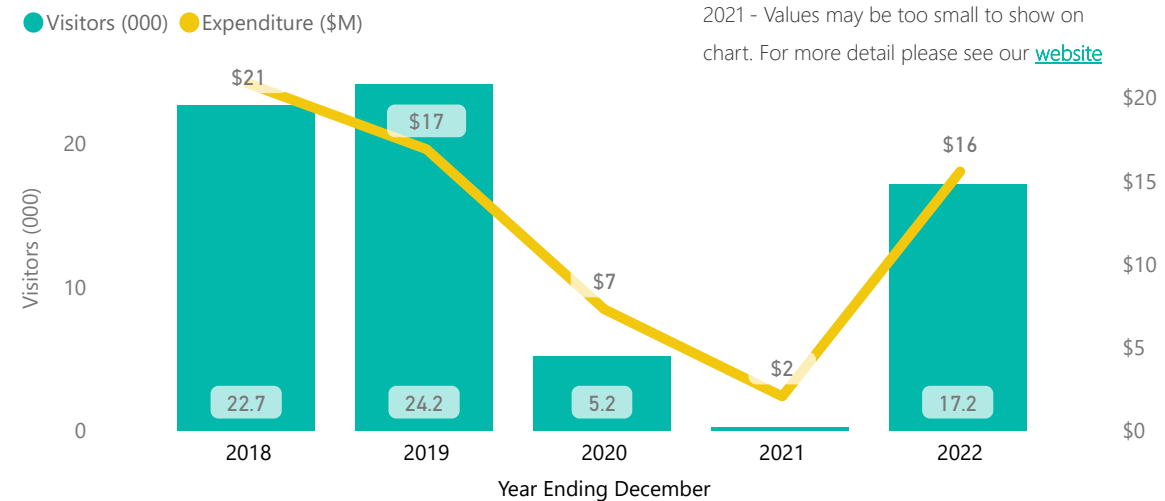
Leisure Visitation to WA¹



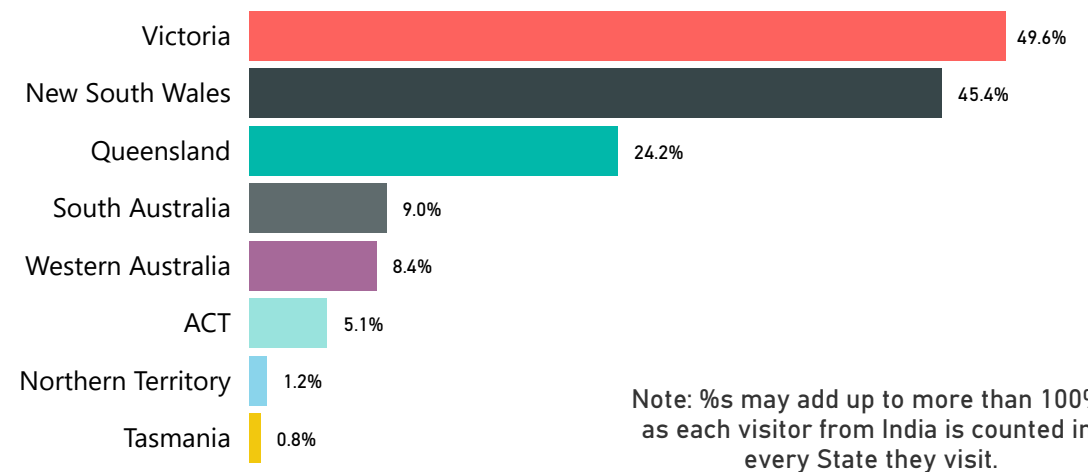
International Visitors and Spend by Purpose (WA)¹



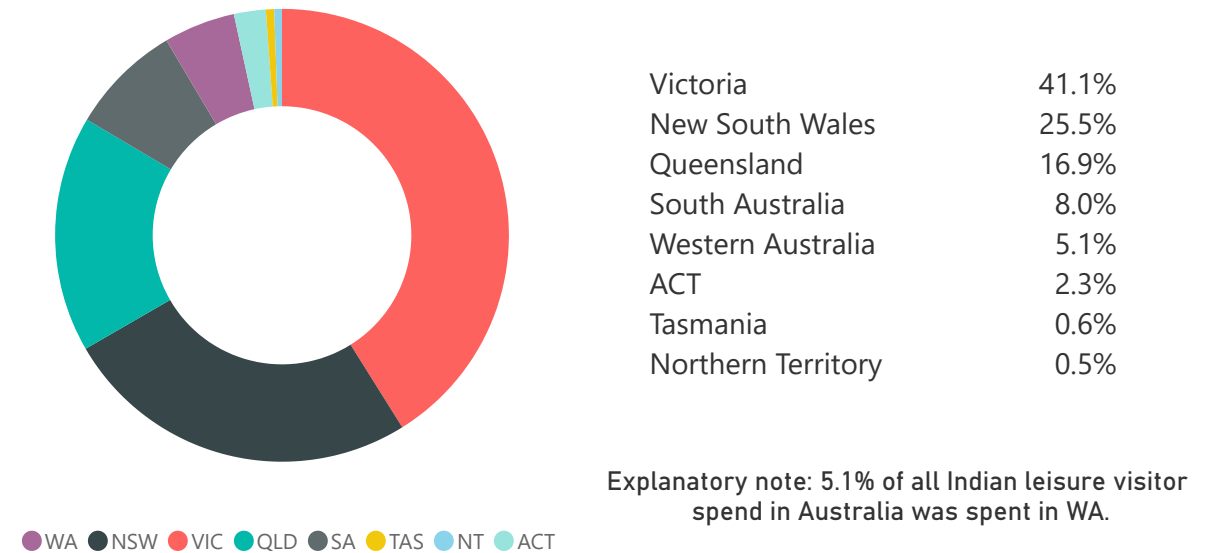
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



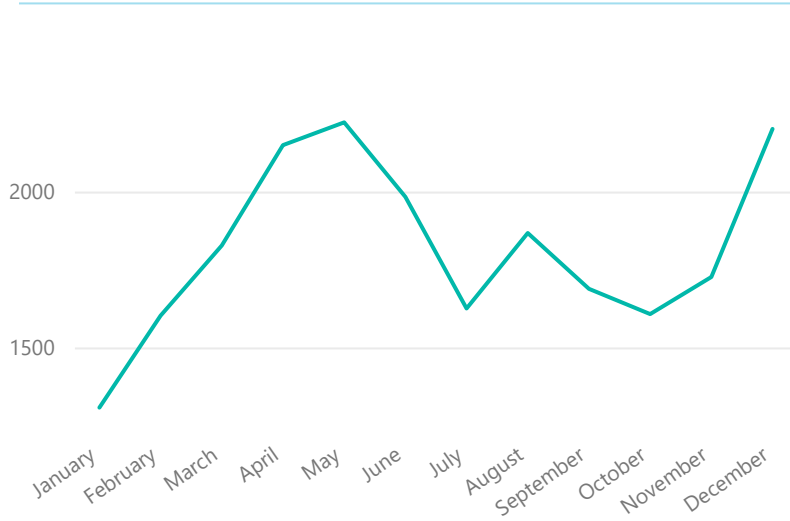
Market Share of International Leisure Visitor Spend in Australia¹



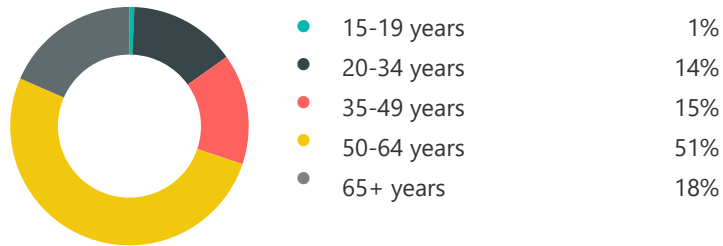
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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

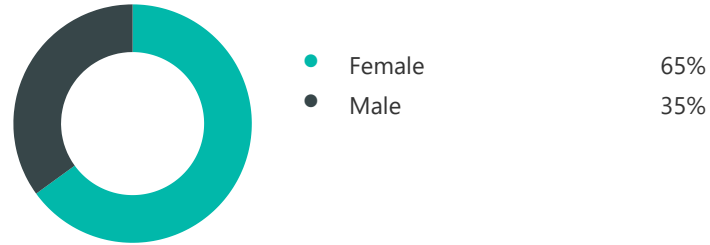
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



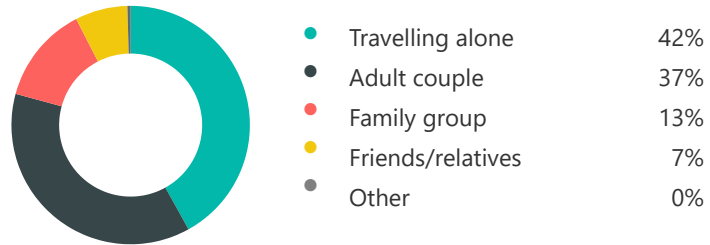
Age³



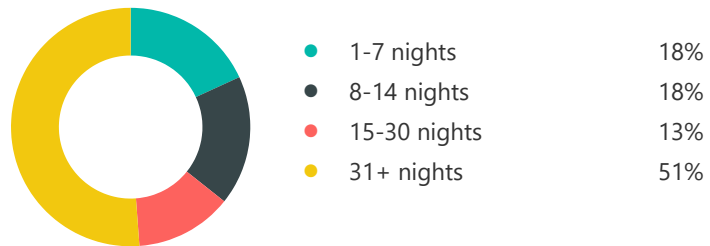
Gender³



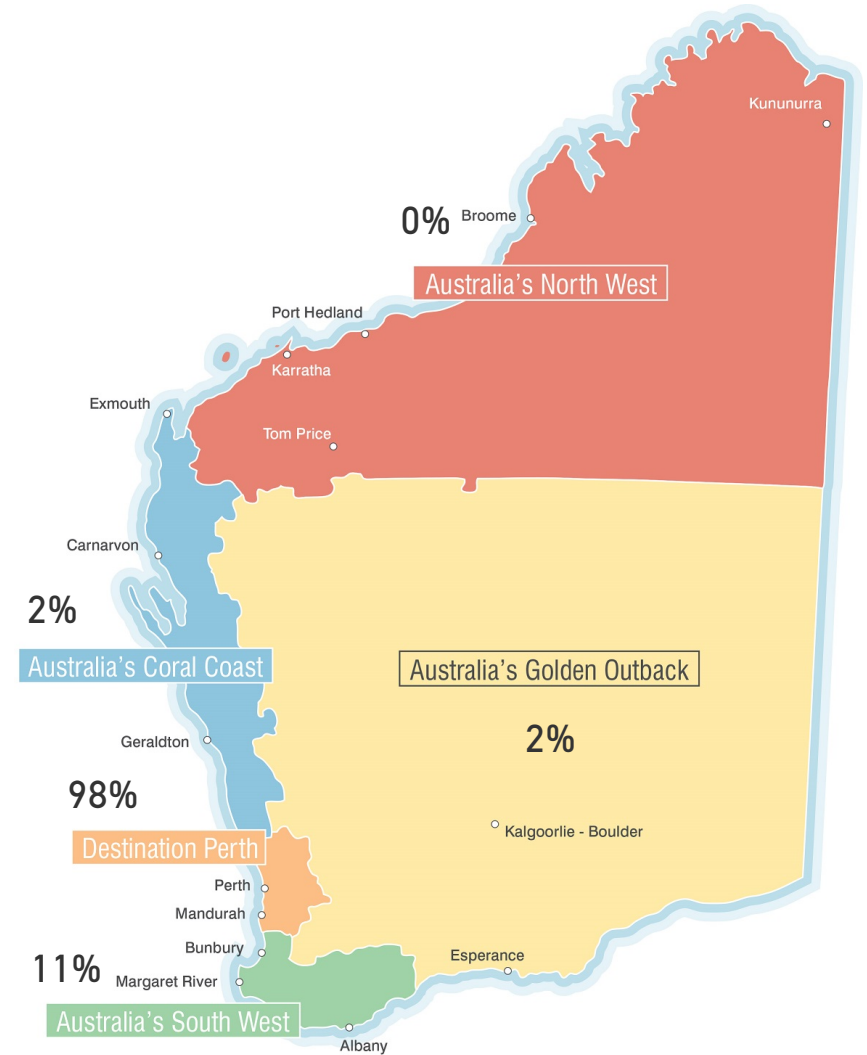
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

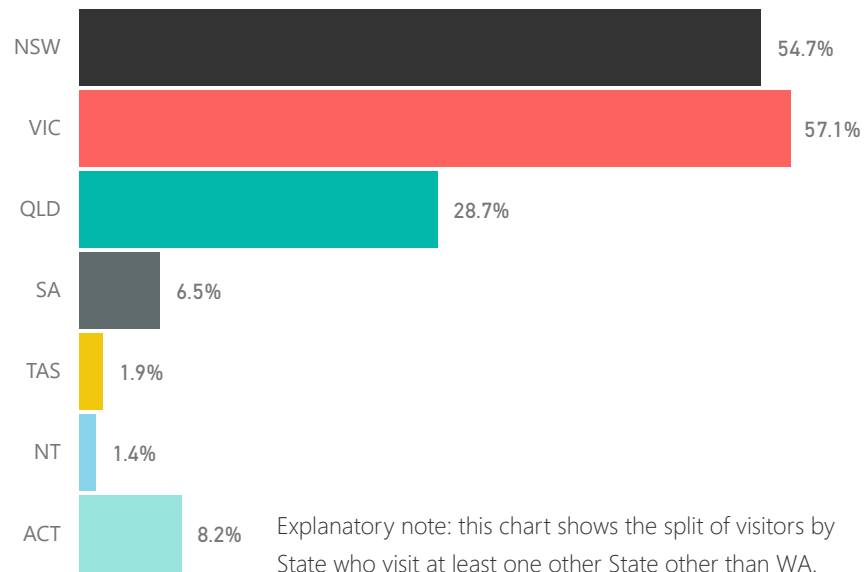
1	Eat out / dine at a restaurant and/or cafe	89%
2	Go shopping for pleasure	84%
3	Go to the beach	75%
4	Sightseeing/looking around	66%
5	Visit national parks / state parks	67%

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

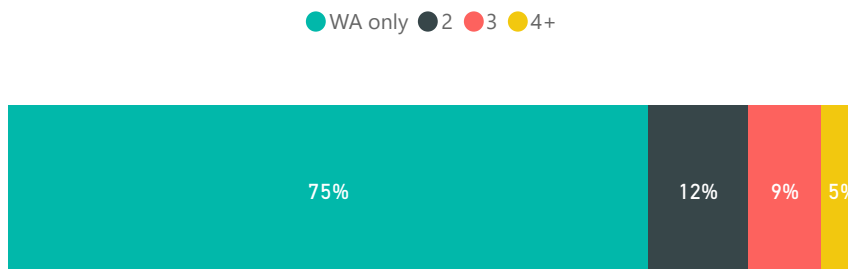
Top 3 Accommodation Choices for Leisure Visitors to WA³

1	Other Private Accommodation	88%
2	Friends or relatives property	85%
3	Hotel/resort/motel or motor Inn	12%

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, 94% 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

63% of Indian leisure visitors to WA are on a return visit to Australia

Travel Packages³

2% of Indian leisure visitors to WA arrived on a travel package

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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 World class natural beauty
- 2 Safety & security
- 3 World class aquatic & coastal
- 4 Clean cities
- 5 Family friendly

World-class natural beauty and aquatic & coastal experiences remain in the top 3 for India whilst safety and security has increased during recent times. Family-friendly destinations are also important to this market.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 Online hotel booking site
- 2 Videos on internet
- 3 Online flights booking site
- 4 Online Travel agent
- 5 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

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 High cost of travelling around
- 2 I have already travelled there and now want to see other places
- 3 Expensive airfares
- 4 I am concerned about the Australian climate
- 5 There are other places I would prefer to travel to/ have planned to travel to

Cost is a significant barrier – both the initial outlay for the airfare and on-the-ground costs. 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. The feeling of "been there, done that" can be overcome by continuing to raise awareness of the nature, wildlife and coastal experiences that are unique to WA.

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APPEALING WA DESTINATIONS AND EXPERIENCES

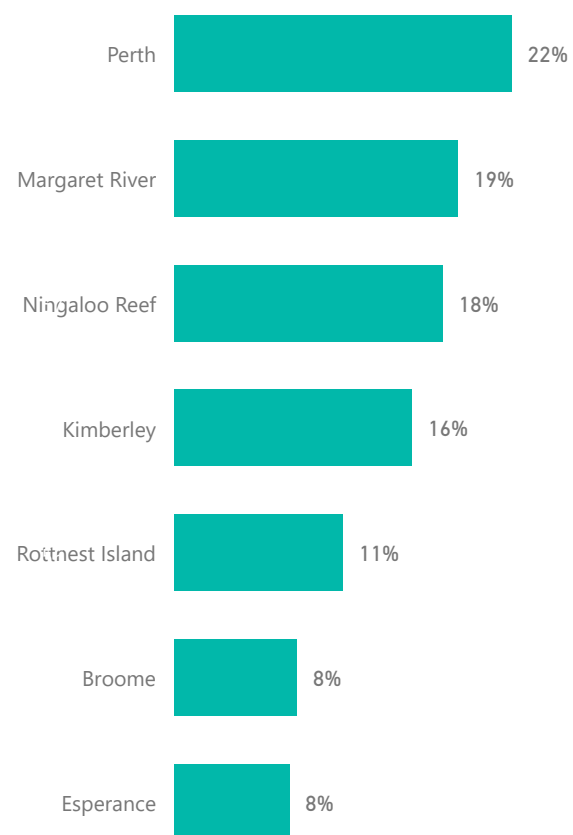
In research undertaken in 2018, Indian HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

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

Most Appealing Experiences⁷

- 1 Scenic flight over the pink lake**
(Esperance)
- 2 Picnic lunch & spotting kangaroos**
(Esperance)
- 3 Spotting diverse marine wildlife**
(Esperance)
- 4 Sunset camel ride along the beach**
(Broome)
- 5 Lunch by the Swan River or Indian ocean**
(Perth & Surrounds)
- 6 Boat ride through horizontal waterfalls**
(Kimberley)
- 7 Witness breeding humpback whales**
(Kimberley)
- 8 Seeing the 'Staircase to the moon'**
(Broome)
- 9 Viewing marine wildlife**
(Rottnest Island)
- 10 Artisan produce & secluded vineyards**
(Perth & Surrounds)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

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"

Perth & Surrounds

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

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

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
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 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

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