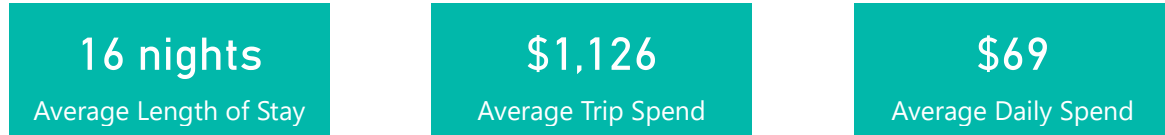


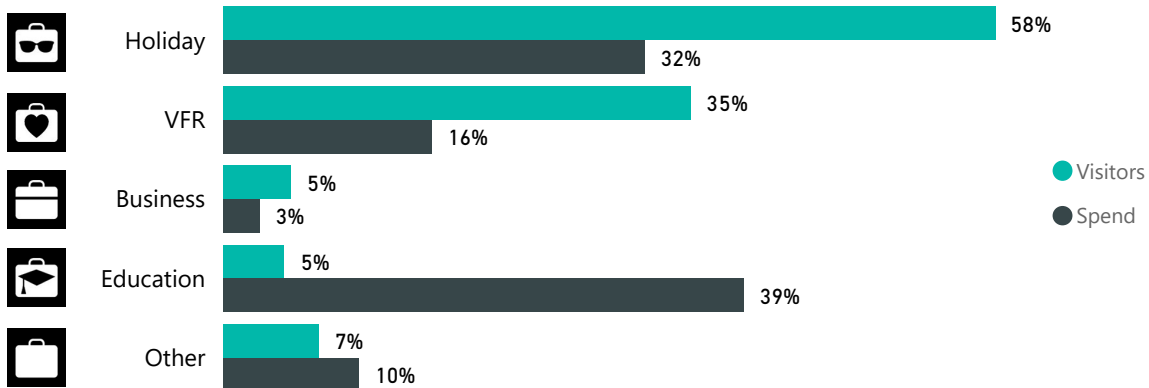
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MARKET OVERVIEW

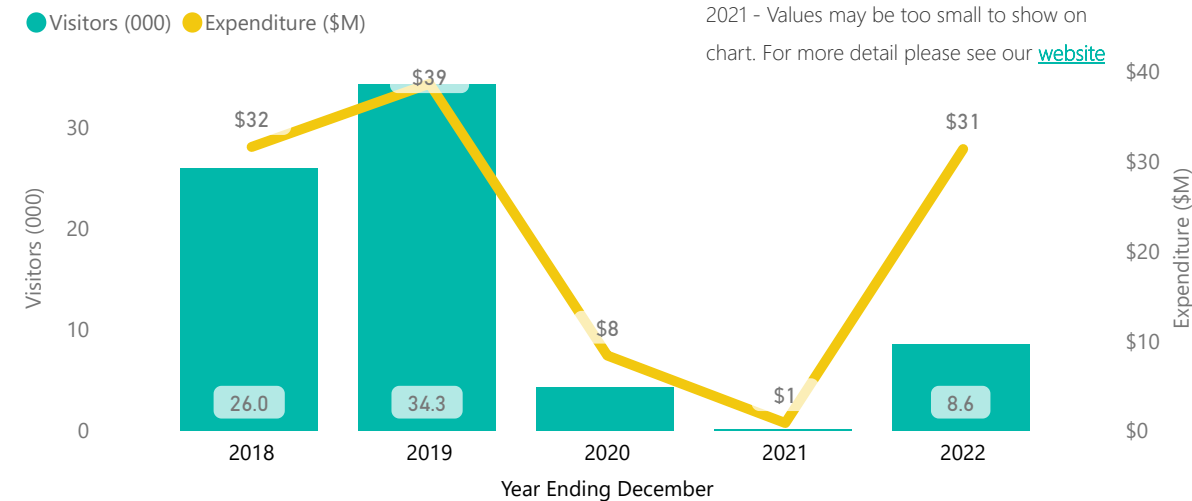
Leisure Visitation to WA¹



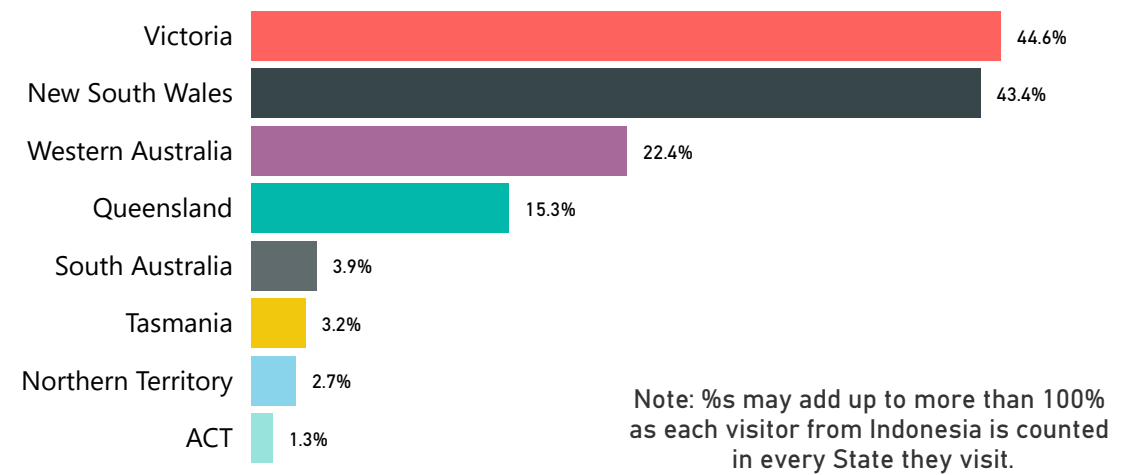
International Visitors and Spend by Purpose (WA)¹



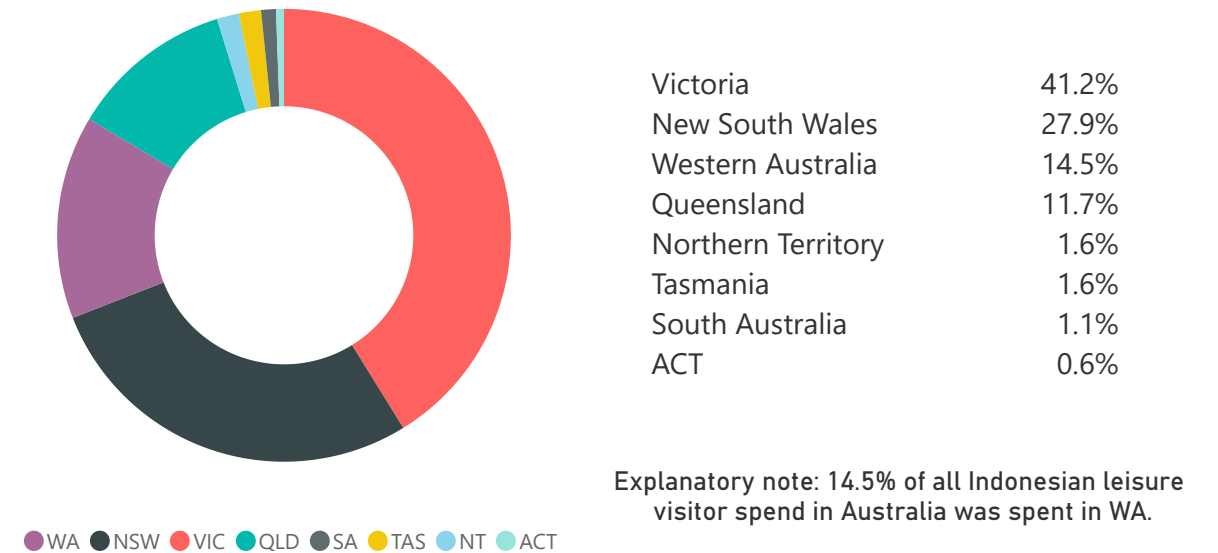
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



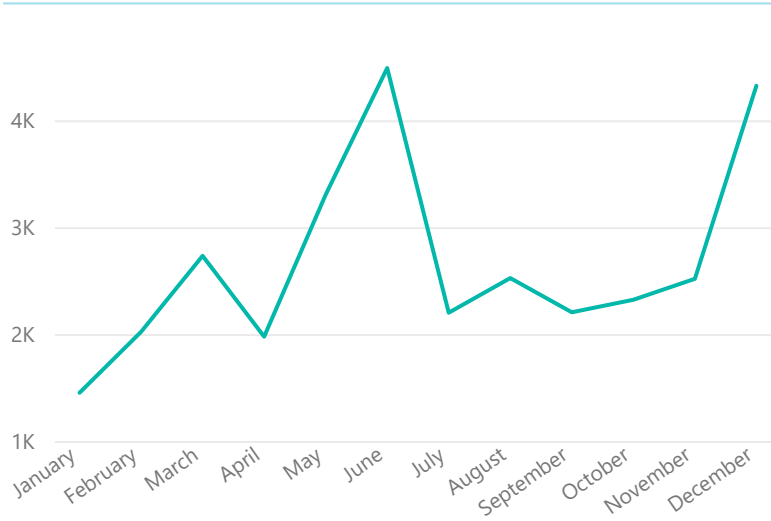
Market Share of International Leisure Visitor Spend in Australia¹



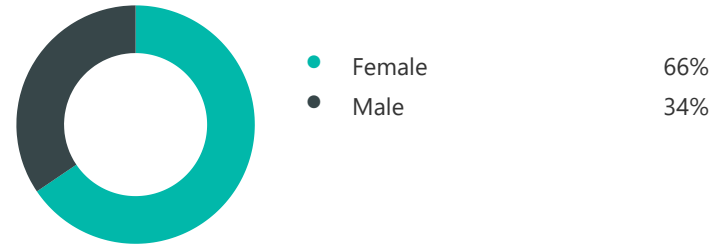
INDONESIA | MARKET PROFILE

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

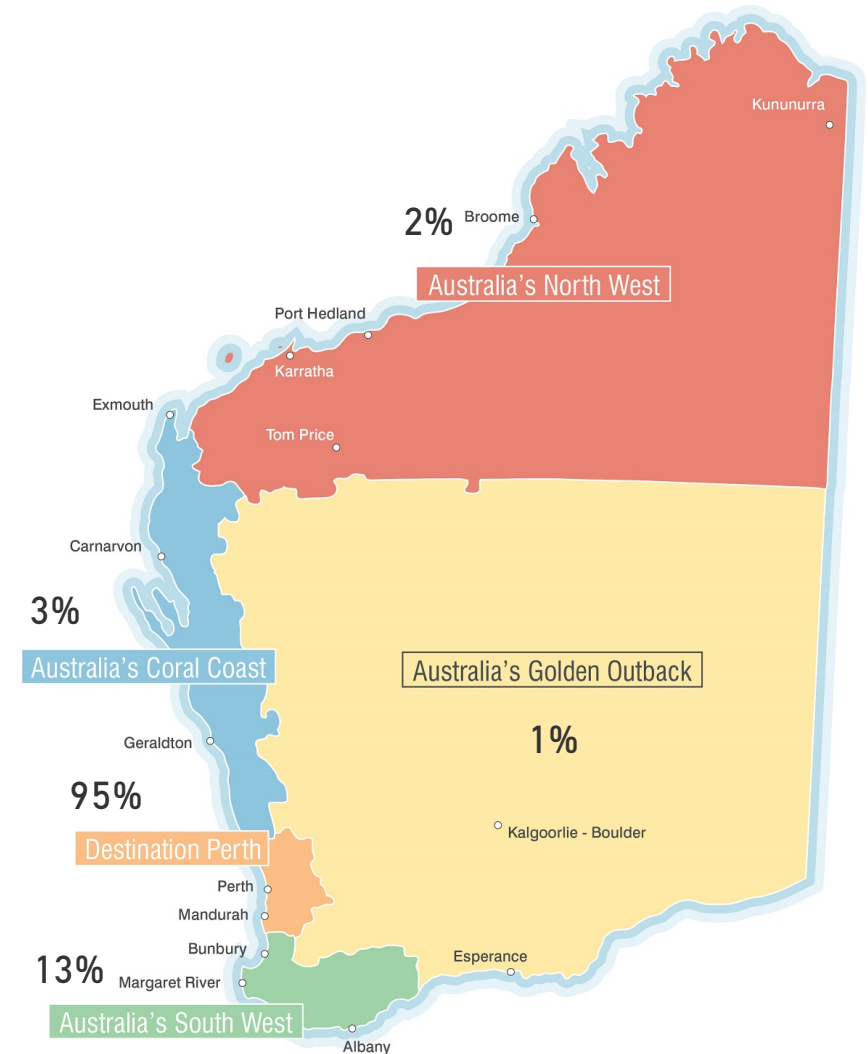
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



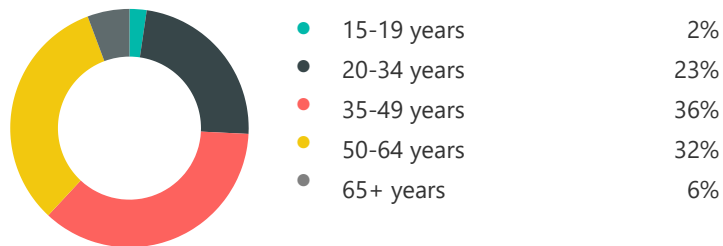
Gender³



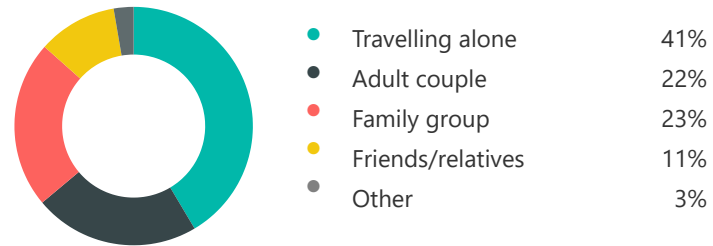
Regional Dispersal³



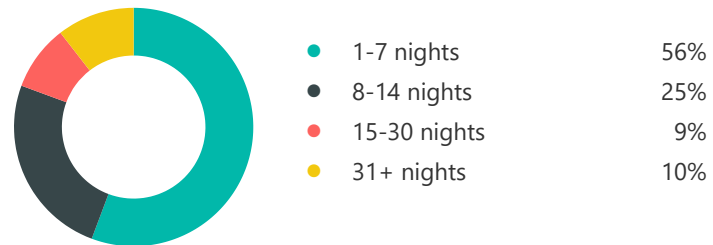
Age³



Travel Party³



Length of Trip³



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

INDONESIA | MARKET PROFILE

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

Top 5 Activities for Leisure Visitors to WA³

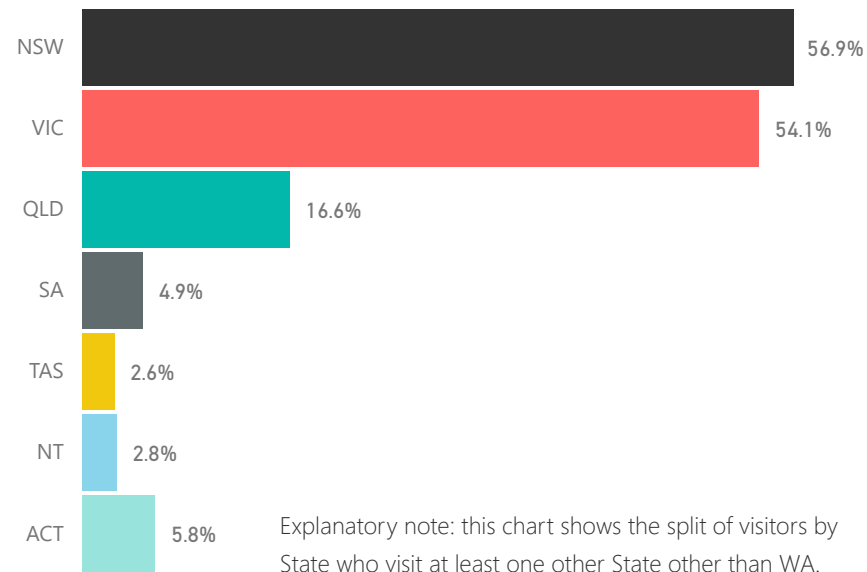
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 89% |
| ② | Go shopping for pleasure | 87% |
| ③ | Go to the beach | 62% |
| ④ | Sightseeing/looking around | 70% |
| ⑤ | Visit botanical or other public gardens | 53% |

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

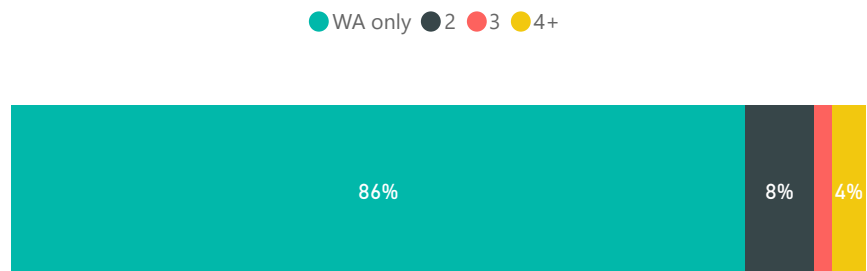
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| ① | Other Private Accommodation | 56% |
| ② | Friends or relatives property | 48% |
| ③ | Hotel/resort/motel or motor Inn | 42% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

96% of Indonesian leisure visitors to WA are free independent travellers. Equally, 95% of Indonesian 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

79% of Indonesian leisure visitors to WA are on a return visit to Australia

Travel Packages³

7% of Indonesian leisure visitors to WA arrived on a travel package

INDONESIA | MARKET PROFILE

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 Clean cities
- 4 Value for money
- 5 Ease of entering a country or obtaining a visa

World class nature and beauty has grown in importance and is now the top importance factor. Safety follows closely. Value for money has also grown very strongly in recent times.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 Videos on internet
- 2 Social media
- 3 Traveller review sites
- 4 General internet searching
- 5 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

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 There are other places I would prefer to travel to/ have planned to travel to
- 2 I am concerned about restrictions and protocols in Australia related to Covid 19
- 3 High cost of living expenses
- 4 I don't know enough about what to do there
- 5 I am concerned about the dangers of Covid-19

A preference for other destinations and lack of knowledge about what to do in Australia are key barriers, along with the high cost of living. Promote WA's unique and affordable nature experiences to overcome these barriers.

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APPEALING WA DESTINATIONS AND EXPERIENCES

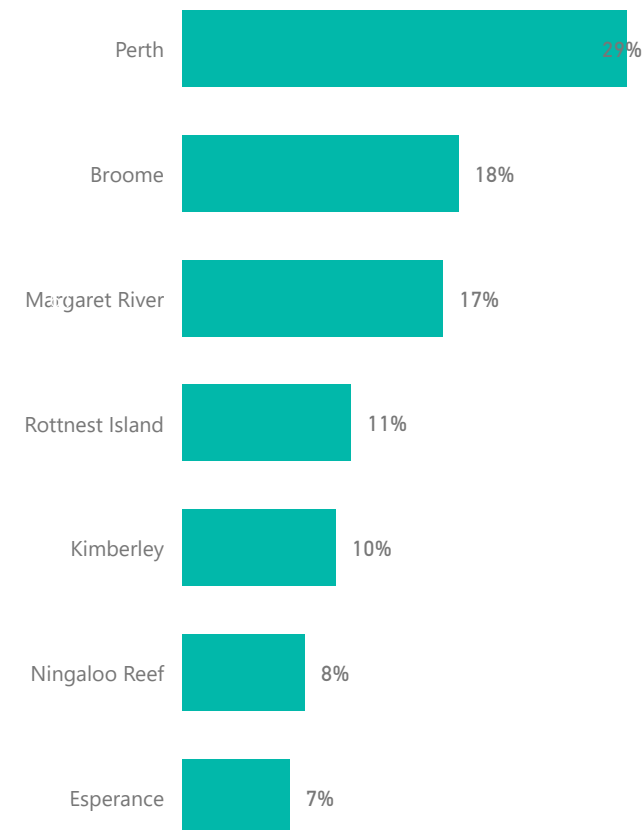
In research undertaken in 2018, Indonesian HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that 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 Experiences⁷

- 1 Visiting beautiful beaches & secluded coves**
(Margaret River)
- 2 Scenic flight over the pink lake**
(Esperance)
- 3 Discovering untouched islands & beaches by boat**
(Esperance)
- 4 Snorkelling in the reef**
(Ningaloo Reef)
- 5 Artisan produce & secluded vineyards**
(Perth & Surrounds)
- 6 Exploring eclectic Fremantle**
(Perth & Surrounds)
- 7 Lunch by the Swan River or Indian ocean**
(Perth & Surrounds)
- 8 Picnic lunch & spotting kangaroos**
(Esperance)
- 9 Seeing the 'Staircase to the moon'**
(Broome)
- 10 Spotting diverse marine wildlife**
(Esperance)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

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"

Perth & Surrounds

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

"City with experience enjoying local sights and culinary"

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