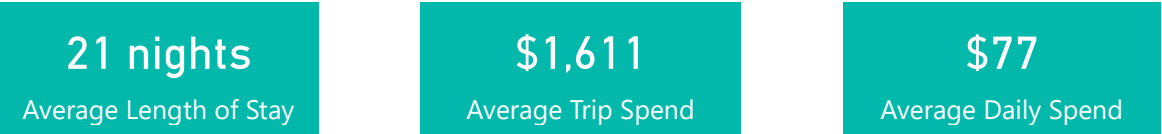


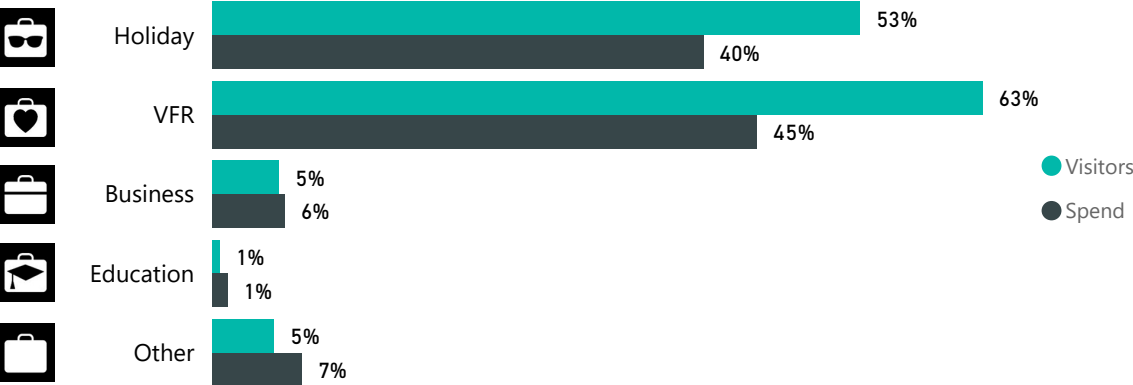
# UNITED KINGDOM | MARKET PROFILE 2022

## MARKET OVERVIEW

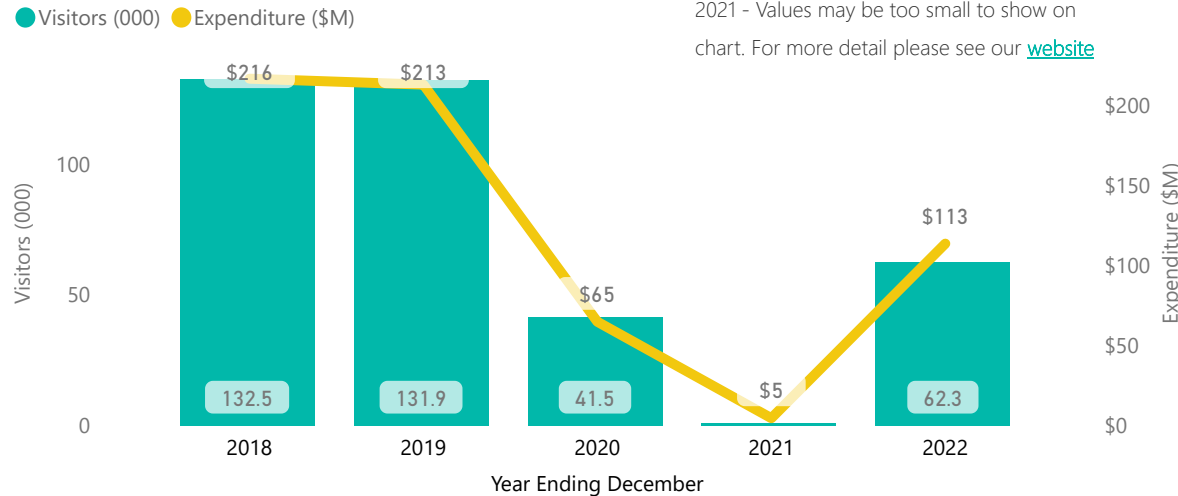
### Leisure Visitation to WA<sup>1</sup>



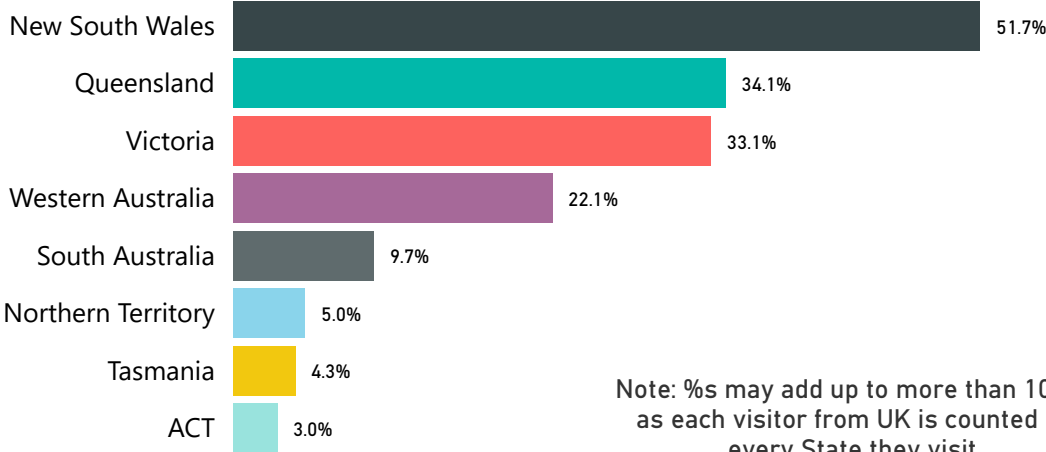
### International Visitors and Spend by Purpose (WA)<sup>1</sup>



### Leisure Visitation and Spend to WA<sup>2</sup>

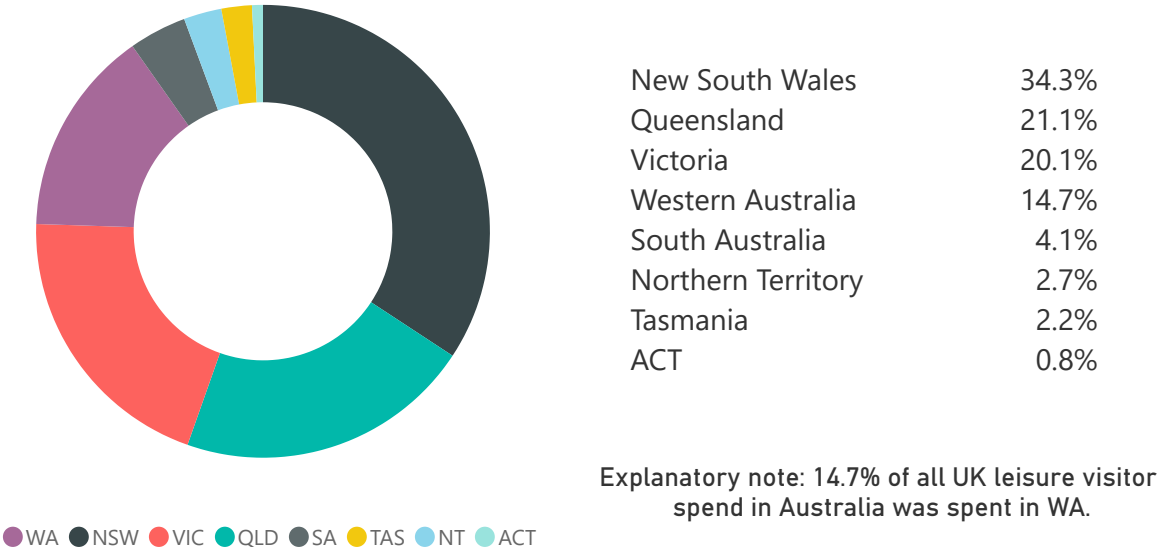


### Market Share of International Leisure Visitors to Australia<sup>1</sup>



Note: %s may add up to more than 100% as each visitor from UK is counted in every State they visit.

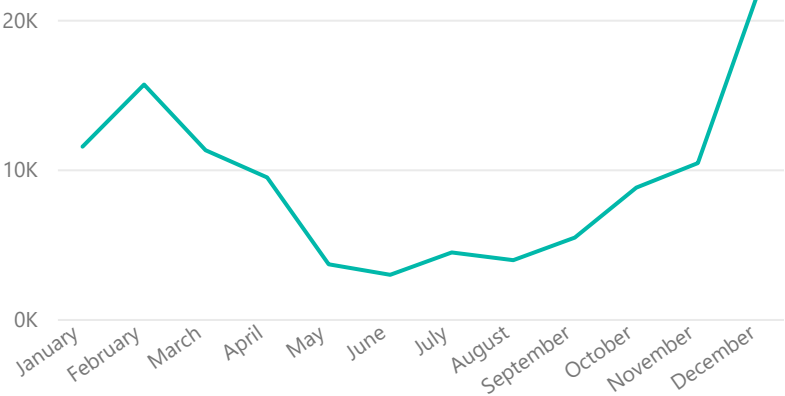
### Market Share of International Leisure Visitor Spend in Australia<sup>1</sup>



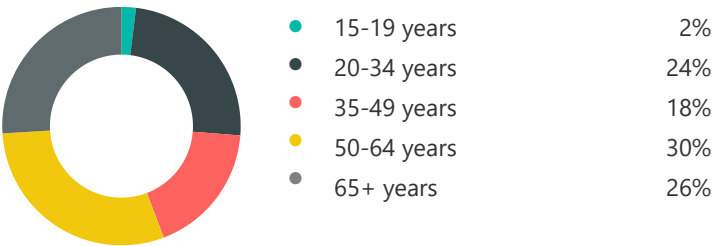
# UNITED KINGDOM | MARKET PROFILE

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

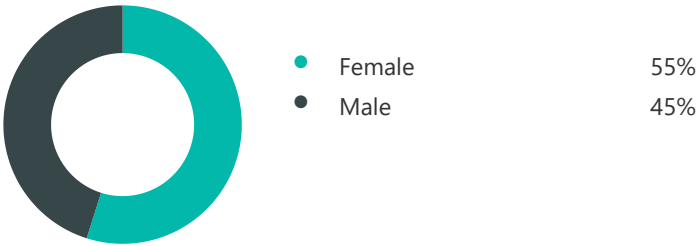
Seasonality - Short-term Leisure Visitor Arrivals to WA<sup>4</sup>



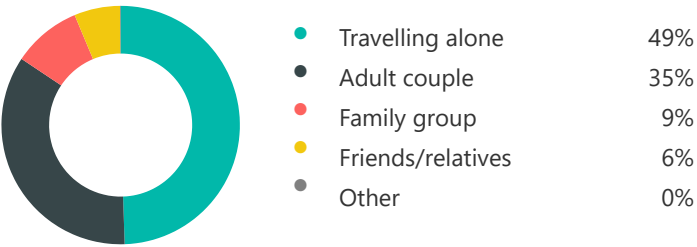
Age<sup>3</sup>



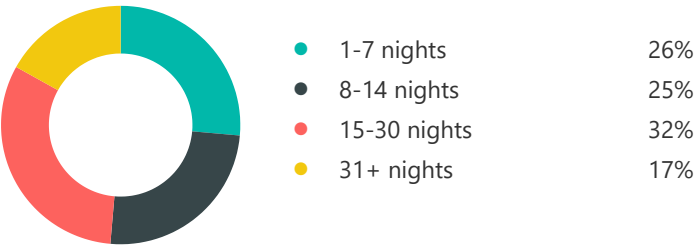
Gender<sup>3</sup>



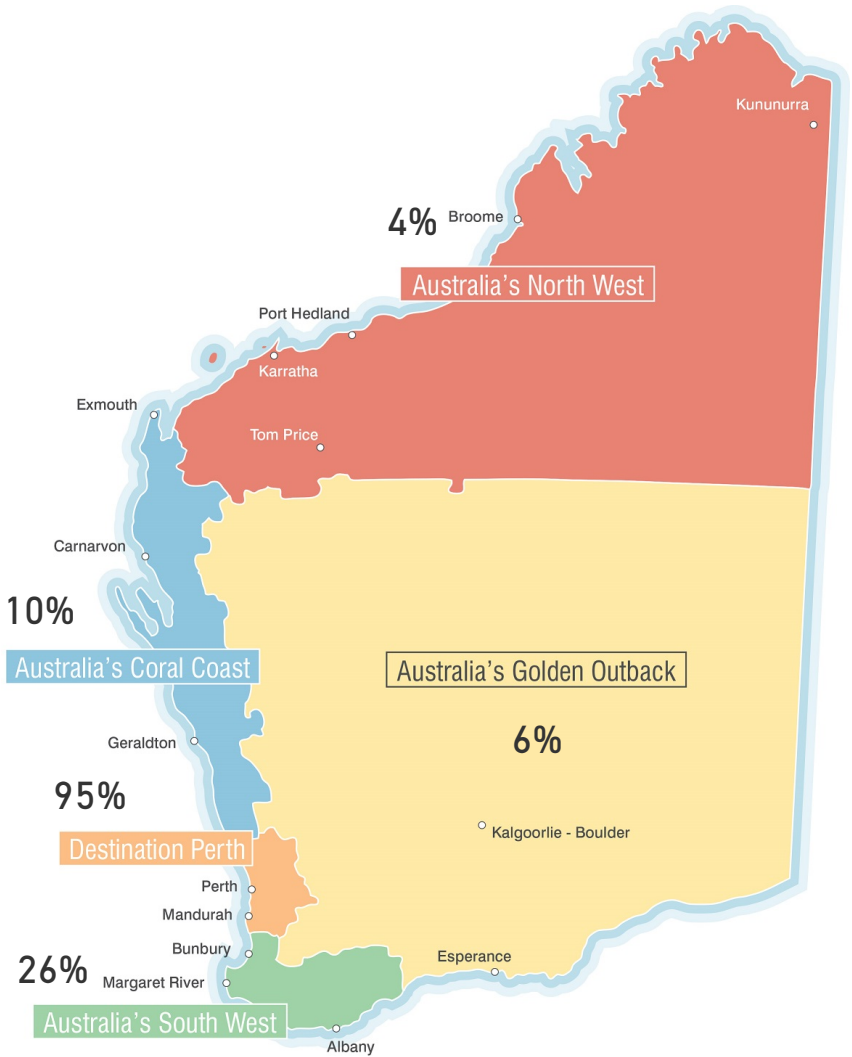
Travel Party<sup>3</sup>



Length of Trip<sup>3</sup>



Regional Dispersal<sup>3</sup>



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

# UNITED KINGDOM | MARKET PROFILE

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

### Top 5 Activities for Leisure Visitors to WA<sup>3</sup>

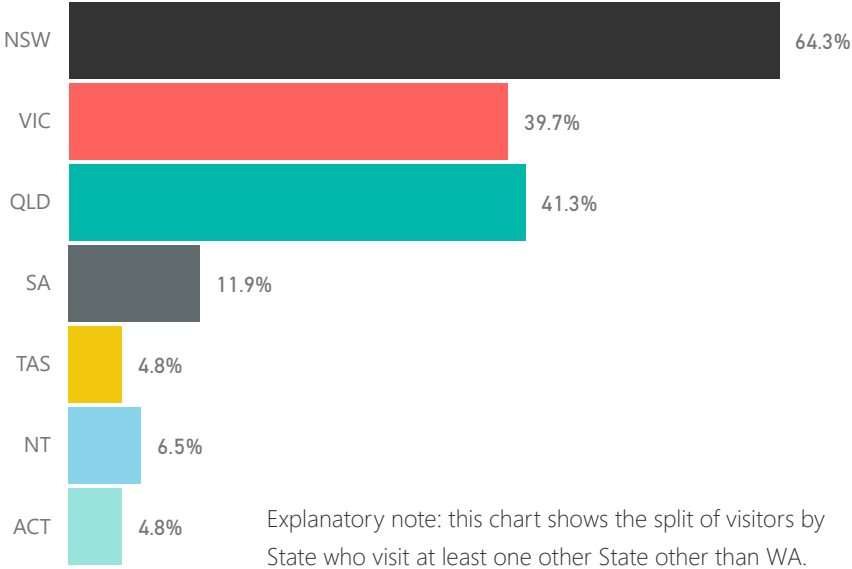
1	Eat out / dine at a restaurant and/or cafe	96%
2	Go shopping for pleasure	80%
3	Go to the beach	85%
4	Sightseeing/looking around	81%
5	Visit national parks / state parks	66%

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

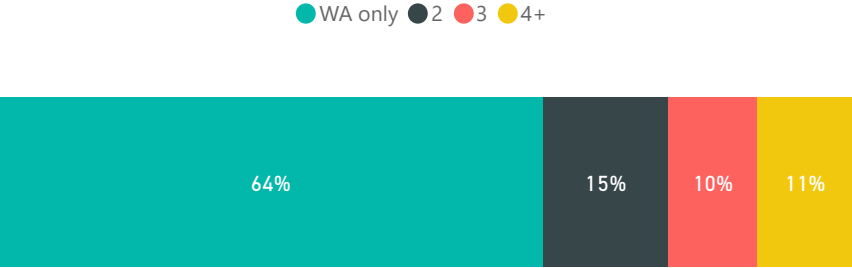
### Top 3 Accommodation Choices for Leisure Visitors to WA<sup>3</sup>

1	Other Private Accommodation	75%
2	Friends or relatives property	70%
3	Hotel/resort/motel or motor Inn	30%

### Other States Visited<sup>3</sup>



### Number of States Visited<sup>3</sup>



### Group Tour v Free Independent Travellers (FIT)<sup>3</sup>

99% of UK leisure visitors to WA are free independent travellers. Equally, 99% of UK 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 Visitors<sup>3</sup>

72% of UK leisure visitors to WA are on a return visit to Australia

### Travel Packages<sup>3</sup>

9% of UK leisure visitors to WA arrived on a travel package

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

# UNITED KINGDOM | 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

### Top 5 Barriers to HYTs visiting Australia <sup>6</sup>

- 1 It is too far to travel
- 2 Expensive airfares
- 3 The current financial/economic situation is not favourable
- 4 There are other places I would prefer to travel to/ have planned to travel to
- 5 High cost of travelling around

### What HYTs are looking for in a holiday destination generally <sup>6</sup>

- 1 Safety & security
- 2 Good food & wine
- 3 Friendly citizens
- 4 World class natural beauty
- 5 Value for money

Safety continues to grow as most important factor in 2022. Good food and wine continues its steady growth in second with value for money and friendly citizens close behind and also growing. All of these factors are more important for the UK than other markets. Family friendly is also increasing in importance.

Distance and cost - both the airfares and on-the-ground expenses are key barriers for this market. WA's unique and affordable food & wine and nature-based 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.

### HYTs Destination Choice and First Booking Timeframes <sup>5</sup>

Based on last out of region holiday

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

### HYTs Top Sources for Inspiration, Information & Booking <sup>5</sup>

#### Inspiration

- 1 General internet searching
- 2 Talking to F&R
- 3 Brochures
- 4 Online flights booking site
- 5 Travel/guide books

#### Booking



##### Flights

Airline (online)

Travel website/app

Travel agent (offline)



##### Activities

Operator (online)

Travel website/app

Travel agent (offline)



##### Accommodation

Travel website/app

Travel agent (offline)

Accomm. Provider (online)

# UNITED KINGDOM | MARKET PROFILE

## APPEALING WA DESTINATIONS AND EXPERIENCES

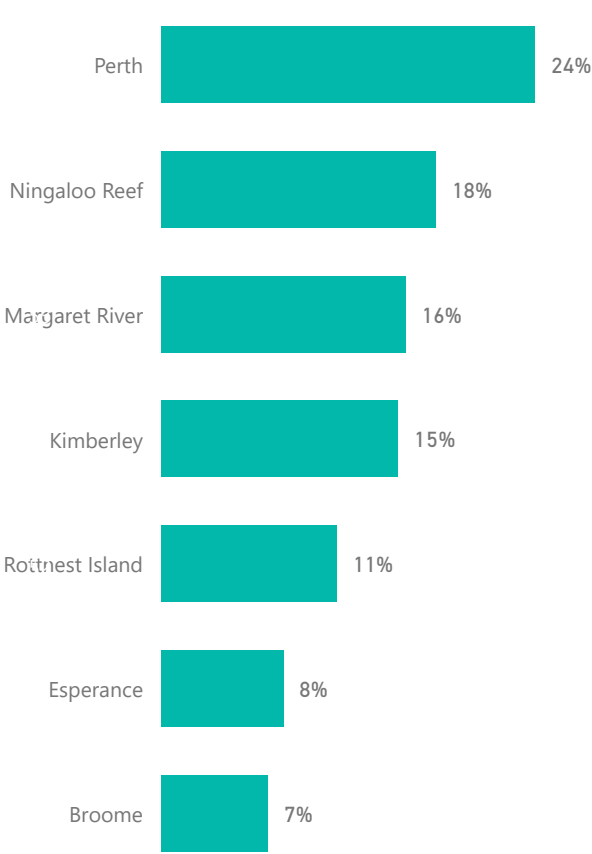
In research undertaken in 2018, UK HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that a mixture of aquatic & coastal, food & wine and nature experiences appeal. Perth is the most preferred destination followed by Ningaloo and Margaret River.

### Most Appealing Experiences<sup>7</sup>

- 1 **Visiting beautiful beaches & secluded coves**  
(Margaret River)
- 2 **Spotting diverse marine wildlife**  
(Esperance)
- 3 **Discovering untouched islands & beaches by boat**  
(Esperance)
- 4 **Lunch by the Swan River or Indian ocean**  
(Perth & Surrounds)
- 5 **Witness breeding humpback whales**  
(Kimberley)
- 6 **Picnic lunch & spotting kangaroos**  
(Esperance)
- 7 **Boat ride through horizontal waterfalls**  
(Kimberley)
- 8 **Cruising along the untouched coast**  
(Kimberley)
- 9 **Discovering restaurants, bars & cafes**  
(Perth & Surrounds)
- 10 **Viewing marine wildlife**  
(Rottnest Island)

### Most Appealing Destination<sup>7</sup>



### Why These Destinations and Experiences Appeal<sup>7</sup>

#### Margaret River

"Interested to see the vineyards and take advantage of the walks"

#### Ningaloo Reef

"Love the fact that you can swim with the wildlife and have unique experiences"

#### Perth & Surrounds

"I like the idea of visiting another city area with good food and wines"

"Loads of outdoor activities as well as beautiful beaches and water to escape to"

#### 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](mailto:research@westernaustralia.com)