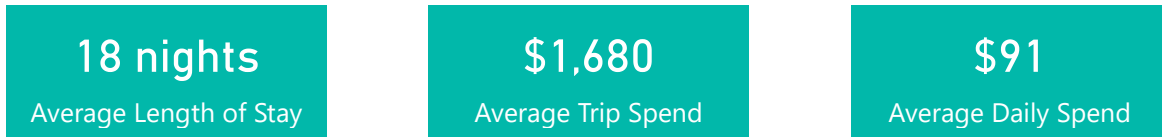


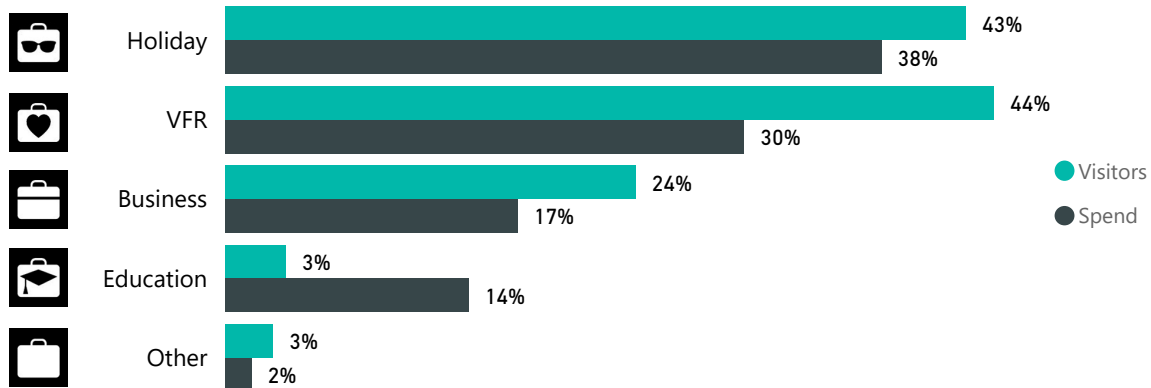
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MARKET OVERVIEW

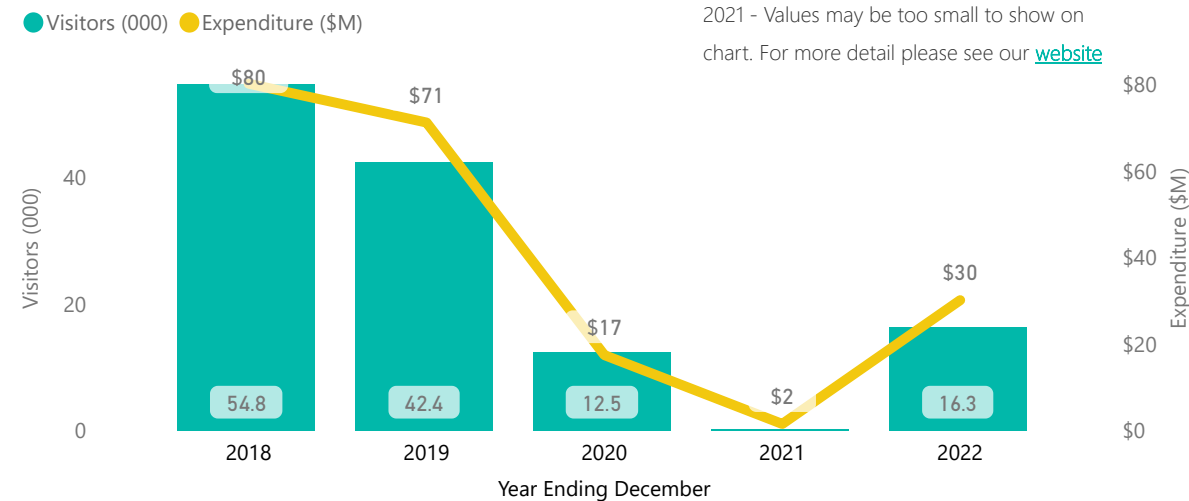
Leisure Visitation to WA¹



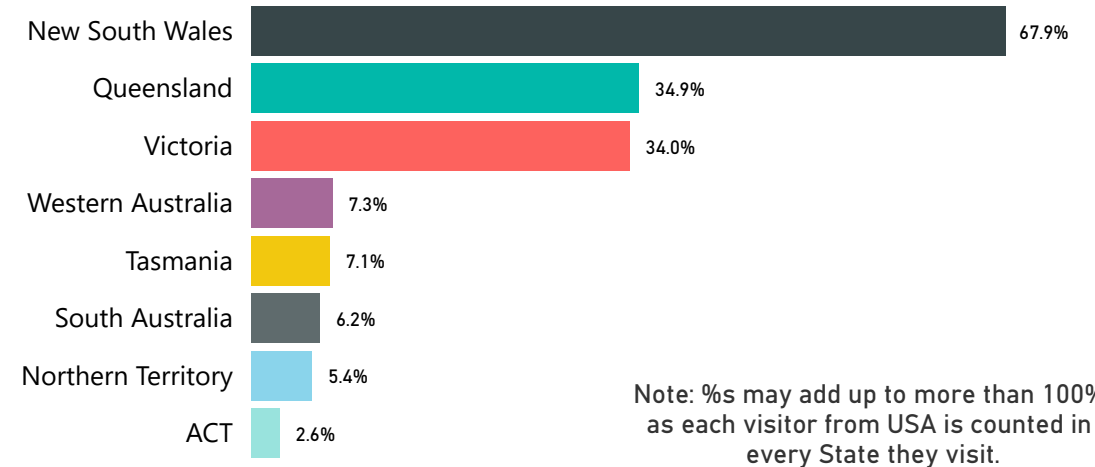
International Visitors and Spend by Purpose (WA)¹



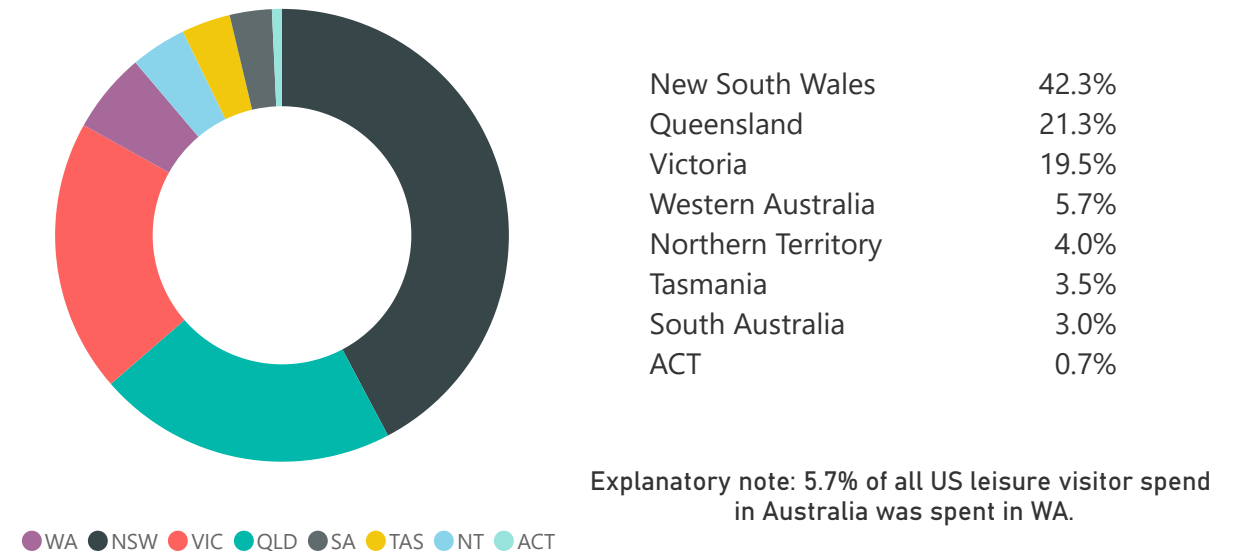
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



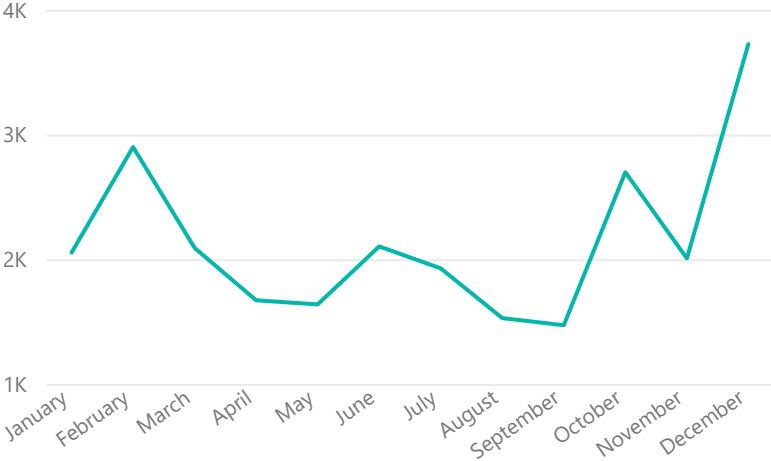
Market Share of International Leisure Visitor Spend in Australia¹



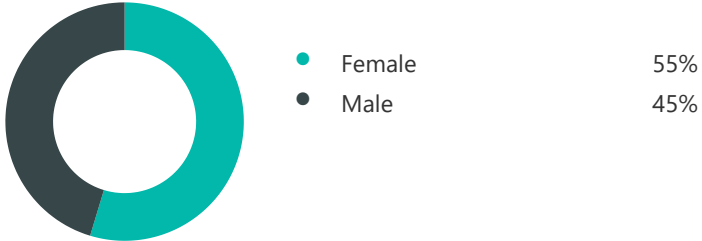
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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

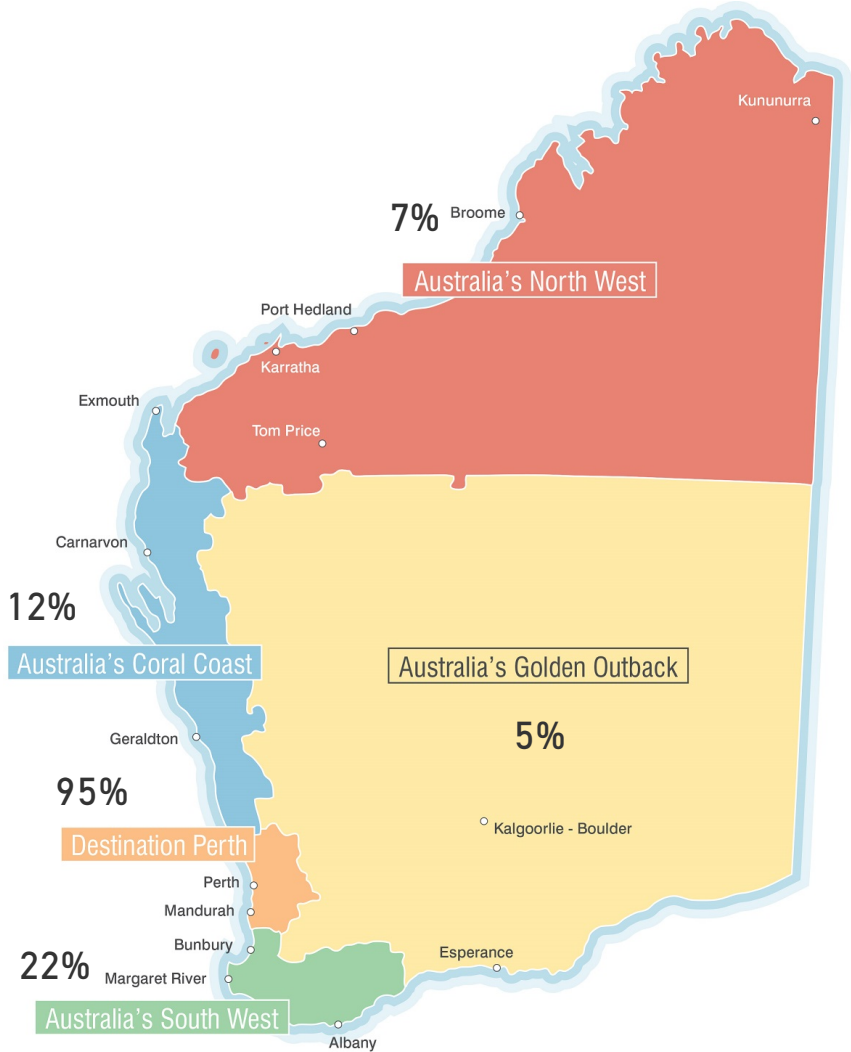
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



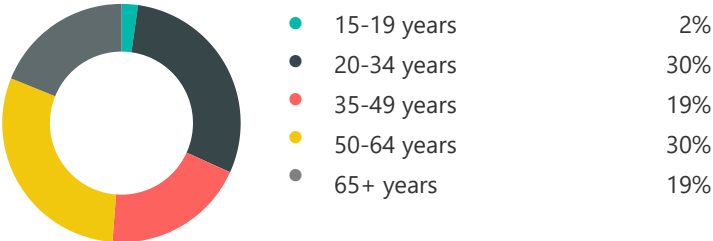
Gender³



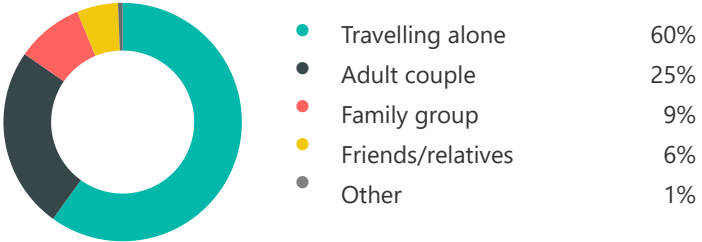
Regional Dispersal³



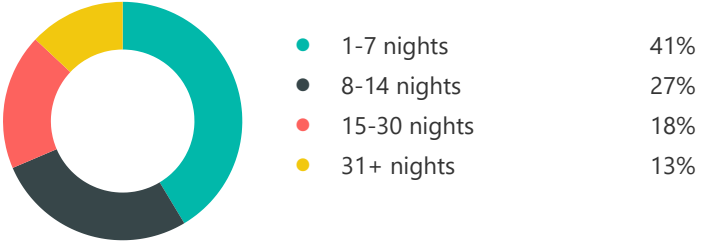
Age³



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.

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

Top 5 Activities for Leisure Visitors to WA³

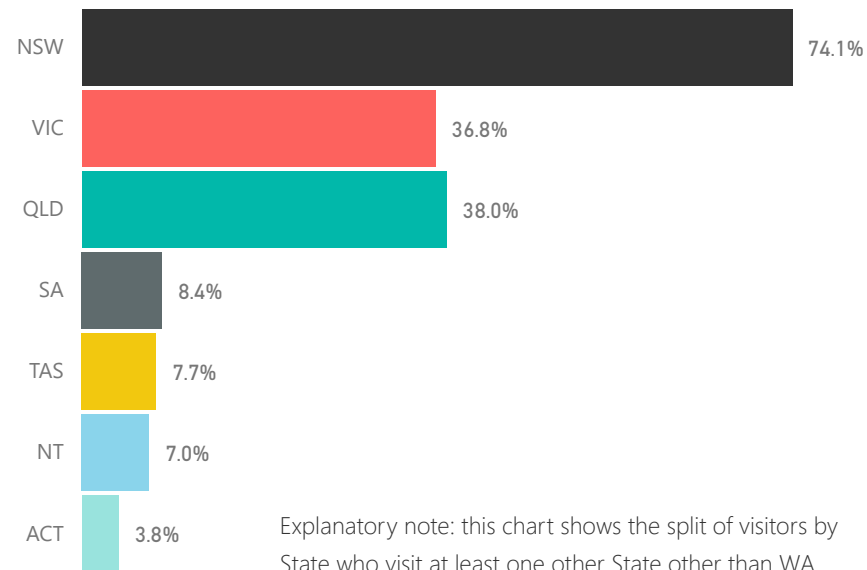
1	Eat out / dine at a restaurant and/or cafe	94%
2	Go shopping for pleasure	70%
3	Go to the beach	77%
4	Sightseeing/looking around	81%
5	Visit national parks / state parks	62%

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

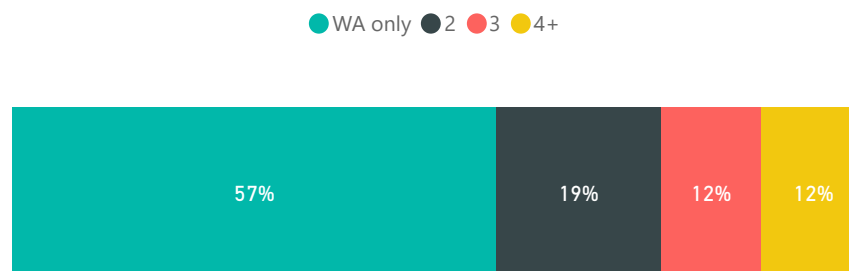
Top 3 Accommodation Choices for Leisure Visitors to WA³

1	Other Private Accommodation	67%
2	Friends or relatives property	56%
3	Hotel/resort/motel or motor Inn	33%

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

97% of US leisure visitors to WA are free independent travellers. Equally, 95% of US 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

60% of US leisure visitors to WA are on a return visit to Australia

Travel Packages³

8% of US 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 Safety & security
- 2 Good food & wine
- 3 Friendly citizens
- 4 World class natural beauty
- 5 Historic buildings & architecture

Safety is most important in USA, though a little less important than for other markets. Good food & wine and friendly citizens are next, both above average. Nature and value for money are less important for USA than most markets, though value has been growing in importance.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

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

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 It is too far to travel
- 2 Expensive airfares
- 3 High cost of travelling around
- 4 There are other places I would prefer to travel to/ have planned to travel to
- 5 I don't know anyone who lives there

Distance and cost related barriers are the main reason why US visitors hesitate to visit Australia. 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.

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APPEALING WA DESTINATIONS AND EXPERIENCES

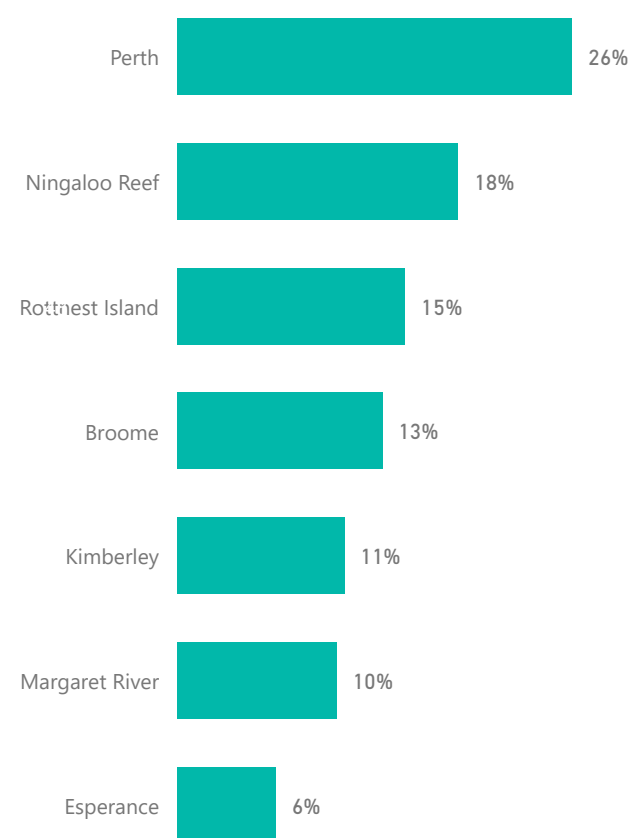
In research undertaken in 2018, USA HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that Perth is 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 Experiences⁷

- 1 **Spotting diverse marine wildlife**
(Esperance)
- 2 **Boat ride through horizontal waterfalls**
(Kimberley)
- 3 **Discovering untouched islands & beaches by boat**
(Esperance)
- 4 **Cruising along the untouched coast**
(Kimberley)
- 5 **Witness breeding humpback whales**
(Kimberley)
- 6 **Picnic lunch & spotting kangaroos**
(Esperance)
- 7 **Visiting beautiful beaches & secluded coves**
(Margaret River)
- 8 **Viewing marine wildlife**
(Rottnest Island)
- 9 **Sunset camel ride along the beach**
(Broome)
- 10 **Exploring limestone caves**
(Margaret River)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Ningaloo Reef

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

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"

Rottnest Island

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

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