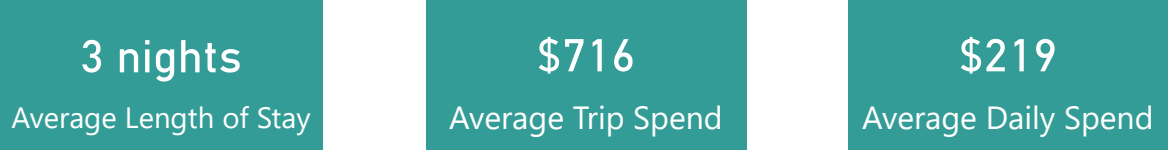


# INTRASTATE | MARKET PROFILE 2023

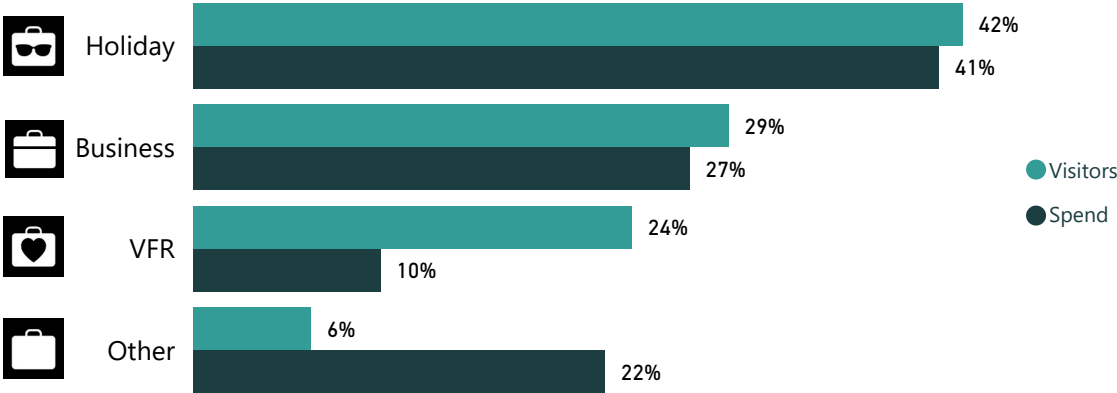
Intrastate Overnight Leisure Visitation to WA 1



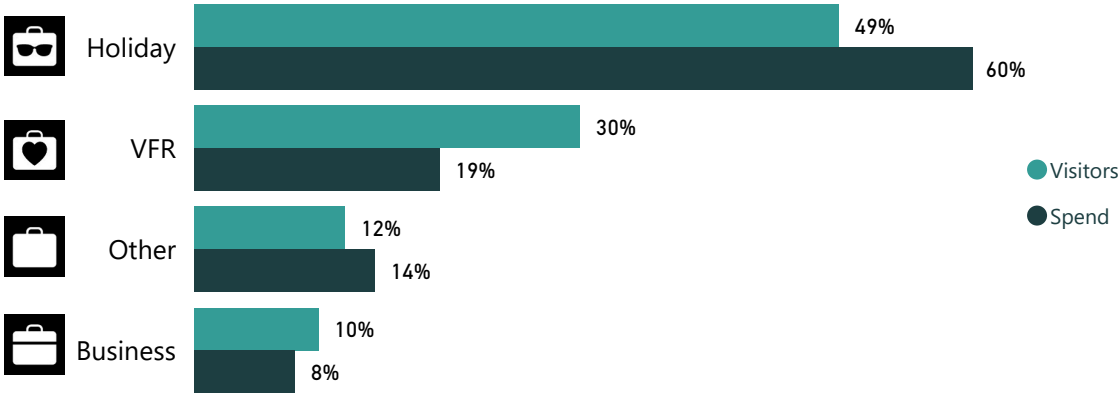
Intrastate Daytrip Leisure Visitation to WA 1



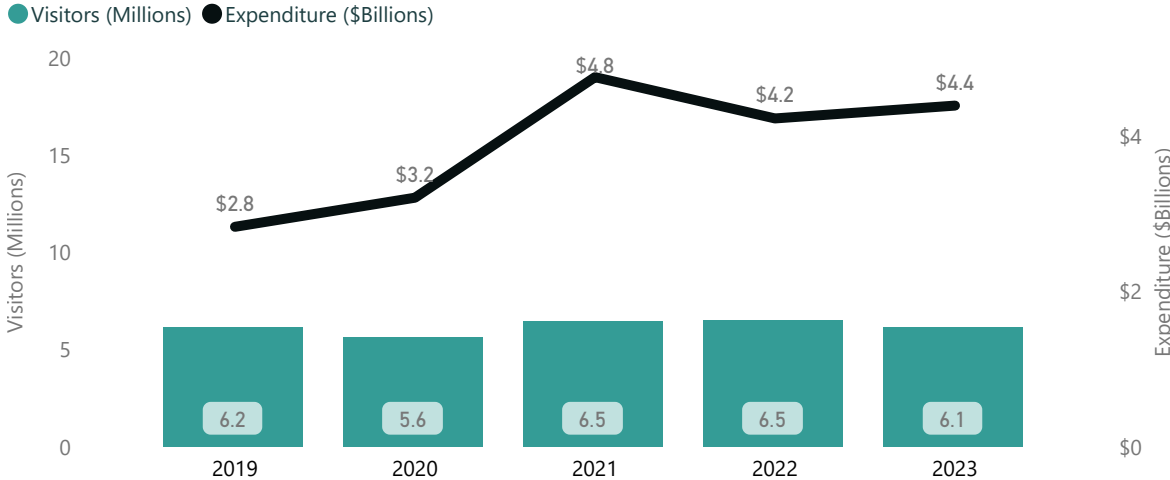
Intrastate Overnight Visitors and Spend by Purpose 1



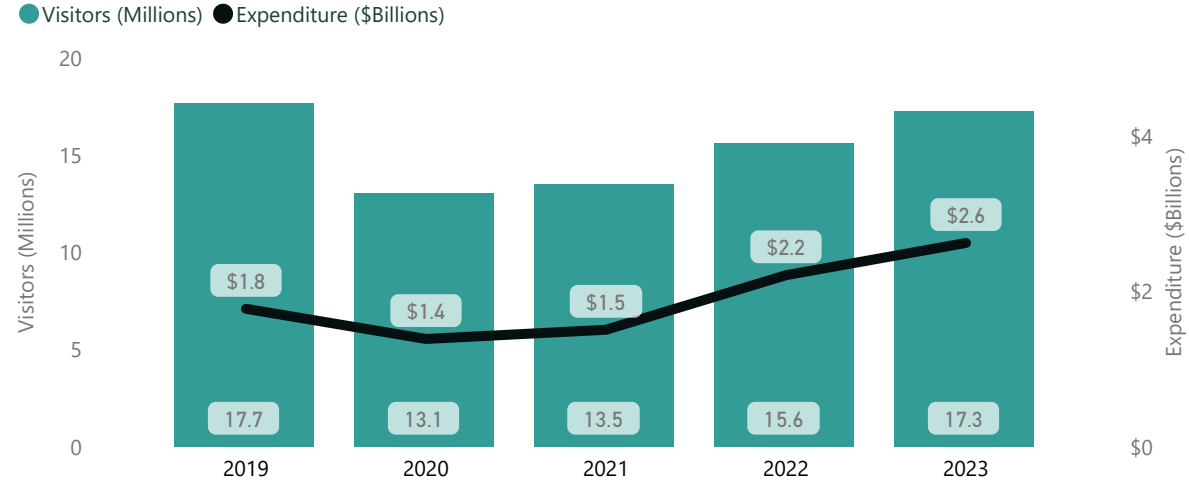
Intrastate Daytrip Visitors and Spend by Purpose 1



Intrastate Overnight Leisure Visitation and Spend to WA 1



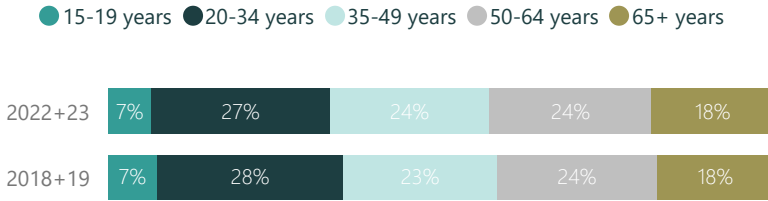
Intrastate Daytrip Leisure Visitation and Spend in WA 1



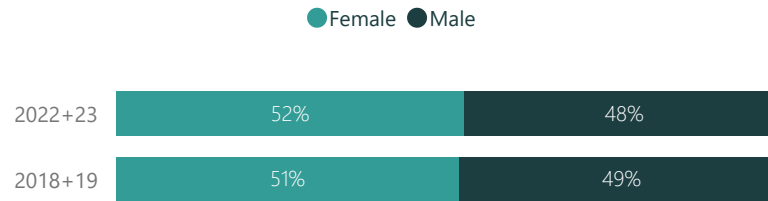
# INTRASTATE | MARKET PROFILE 2023

## LEISURE VISITOR PROFILE AND TRIP BEHAVIOUR - OVERNIGHT

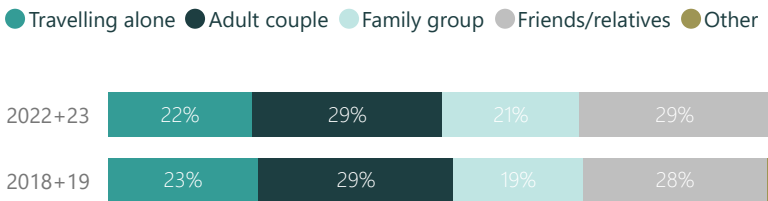
### Age <sup>2</sup>



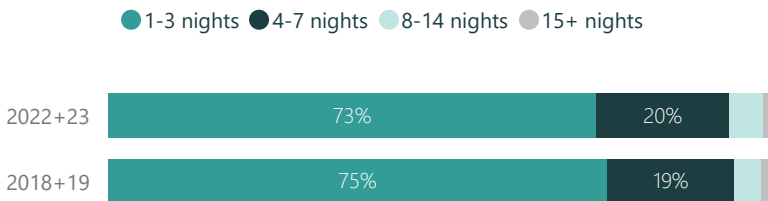
### Gender <sup>2</sup>



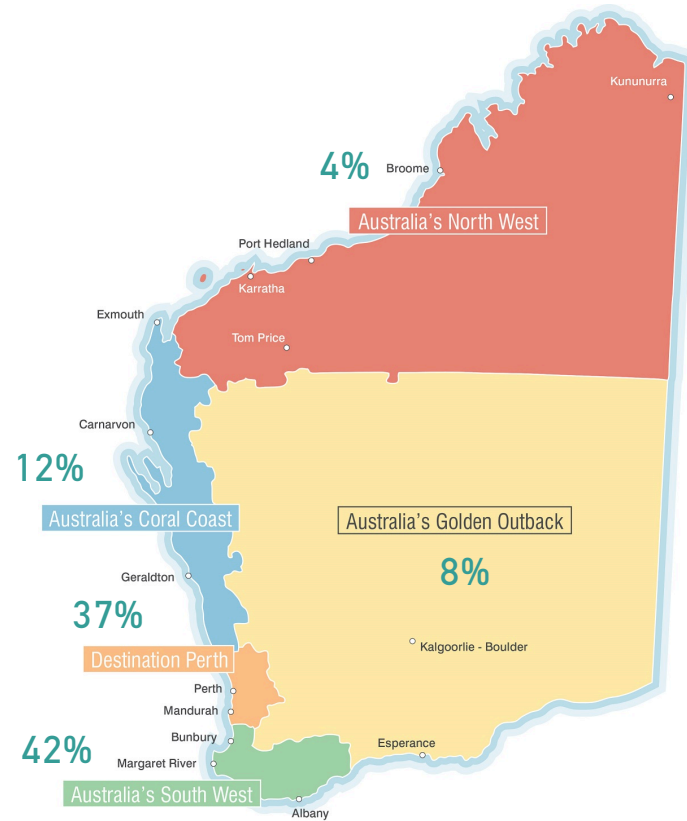
### Travel Party <sup>2</sup>



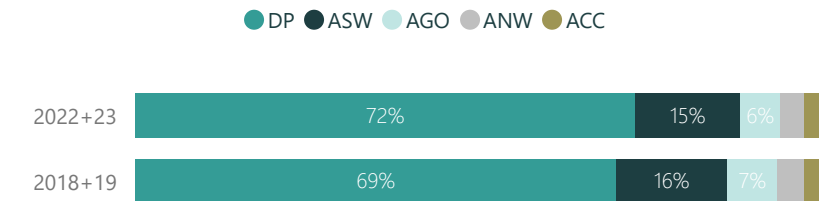
### Length of Trip <sup>2</sup>



### Regional Dispersal <sup>2</sup>



### Home Region <sup>2</sup>



### Top 5 Leisure Activities <sup>2</sup>

Activity	2018+19	2022+23
Eat out / dine at a restaurant and/or cafe	57%	56%
Visit friends & relatives	51%	39%
Go to the beach	36%	37%
Sightseeing/looking around	31%	25%
Pubs, clubs, discos etc	22%	24%

### Top 3 Accommodation Choices <sup>2</sup>

Accommodation Choice	2018+19	2022+23
Friends or relatives property	46%	41%
Caravan or camping	21%	25%
Hotel/resort/motel or motor Inn	16%	17%

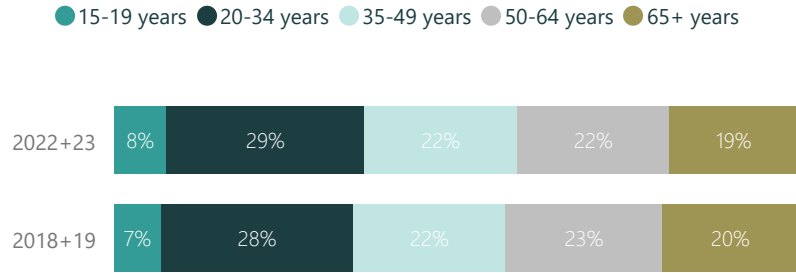
### Top LGAs Visited <sup>2</sup>

LGA	2018+19	2022+23
Busselton	12%	12%
Perth	9%	10%
Augusta-Margaret River	7%	10%
Mandurah	6%	6%
Albany	5%	4%

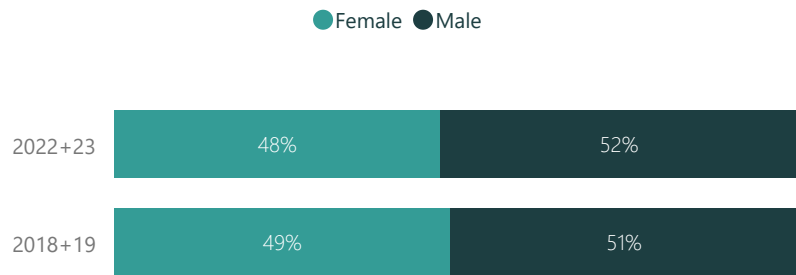
# INTRASTATE | MARKET PROFILE 2023

## LEISURE VISITOR PROFILE AND TRIP BEHAVIOUR - DAYTRIP

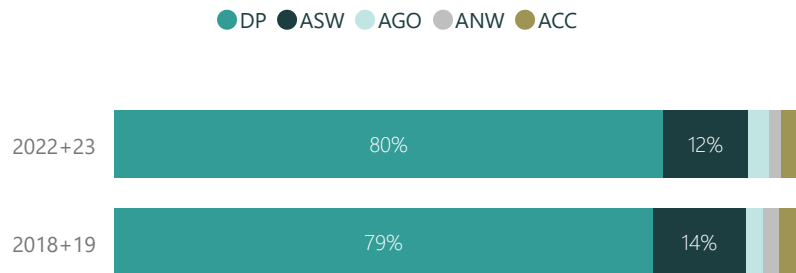
### Age <sup>2</sup>



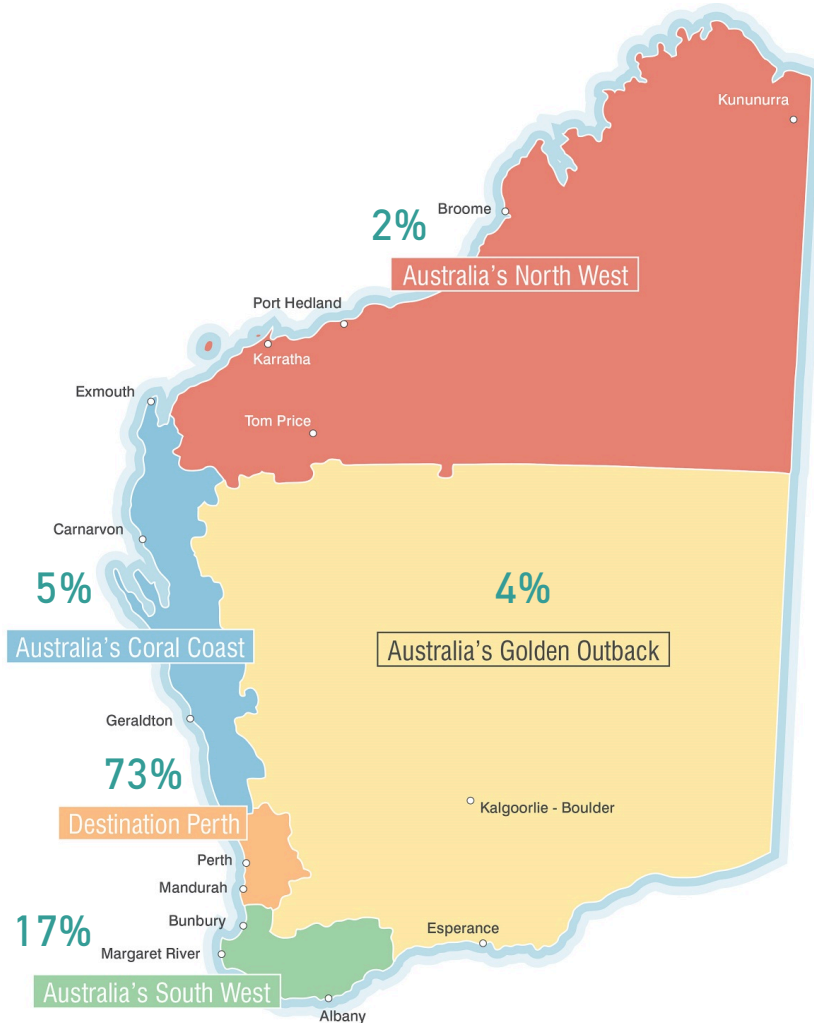
### Gender <sup>2</sup>



### Home Region <sup>2</sup>



### Regional Dispersal <sup>2</sup>



**Daytrip'** - Daytrip visitors are those who travel for a round trip distance of at least 50km, are away for home for at least 4 hours, and who do not spend a night away from home as part of their travel.

### Top 5 Leisure Activities <sup>2</sup>

	2018+19	2022+23
Eat out / dine at a restaurant and/or cafe	48%	44%
Visit friends & relatives	40%	35%
Sightseeing/looking around	20%	16%
Go to the beach	17%	18%
Go shopping for pleasure	16%	17%

### Top LGAs Visited <sup>2</sup>

	2018+19	2022+23
Mandurah	10%	10%
Perth	9%	10%
Swan	5%	5%
Joondalup	5%	4%
Rockingham	4%	5%

# INTRASTATE | MARKET PROFILE 2023

## MOTIVATIONS, ASSOCIATIONS AND BARRIERS

### WHAT TRAVELLERS ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY <sup>3</sup>

Intrastate Visitors



Value for money



A place where I can relax and unwind



Great food and/or local produce



Friendly and welcoming people/service



Easy to get to, and around



Beaches and coastal experiences



Easy to plan and book



Family friendly/great for kids



Truly unique places and experiences



Not crowded with other tourists

### WHAT TRAVELLERS ASSOCIATE WITH WA <sup>3</sup>

Intrastate Visitors



Beaches and coastal experiences



Road Trips



Great wineries, breweries and distilleries



Easy to plan and book



Family friendly/great for kids



Unspoilt nature and local wildlife



Great food and/or local produce



Plenty of available accommodation



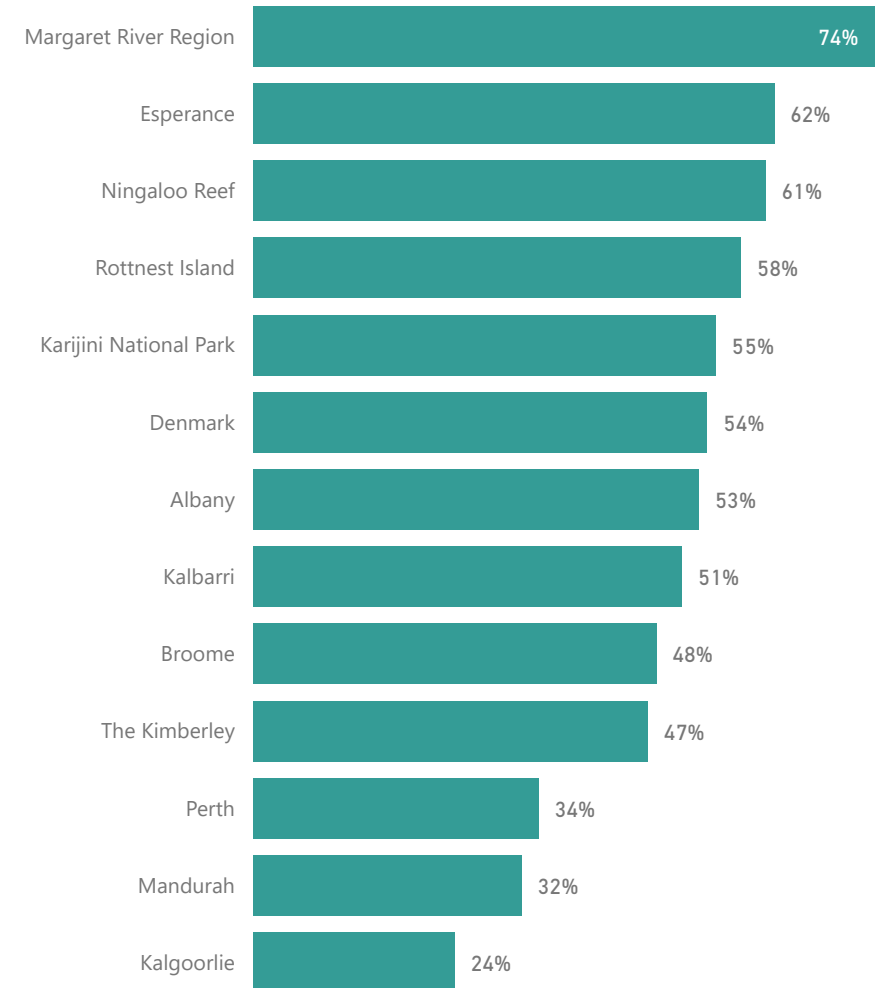
A place where I can relax and unwind



Easy to get to, and around

### CONSIDERATION OF WA HOLIDAY DESTINATIONS <sup>3</sup>

Intrastate Visitors



# INTRASTATE | MARKET PROFILE 2023

## MOTIVATIONS, ASSOCIATIONS AND BARRIERS

### TOP MOTIVATIONS TO VISIT WA <sup>4</sup>

Intrastate Visitors



Beaches/coastal scenery



Pristine natural environments



Unique natural sights



Good food, wine and local cuisine



Treks, trails and/or hikes



Water-based activities (e.g. snorkelling)

### WHAT INSPIRES TRAVELLERS TO VISIT WA <sup>3</sup>

Visited WA in past 2 years or have upcoming trip booked



To get away with family/friends



I want/wanted to explore more of WA



I want/wanted to return to somewhere I've been before



I feel/felt more comfortable travelling within WA



To visit a friend or relative



To escape the weather at home (heat or cold)

### TOP BARRIERS TO VISIT WA <sup>3</sup>

Intrastate Visitors



There are other places I'd rather visit first



I've already been and done everything I want to do in WA



Accommodation and/or experiences in WA cost too much



It costs too much to get to where I want to go



I don't feel excited enough about having a holiday in WA



It takes too long to get to where I want to

# INTRASTATE | MARKET PROFILE 2023

## NOTES & REFERENCES

### Notes

'Intrastate Visitors' - Residents of Western Australia aged 15 years and over who spent at least one night away from home in Western Australia. FIFO travel is included.

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

'Intrastate Daytrip' - Daytrip visitors are those who travel for a round trip distance of at least 50km, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded as is routine travel such as commuting between work/school and home. Routine shopping is included as is travel for all purposes, not just pleasure. Intra-regional daytrips are included, e.g. a Perth resident visiting Mandurah is an intra-regional daytrip within Destination Perth.

### References

1. Tourism Research Australia, National Visitor Survey, YE December 2023
2. Tourism Research Australia, National Visitor Survey, 2-year averages YE December 2018+19 and YE December 2022+23
3. Tourism WA Brand Tracker, Mar 2024
4. Visitor Experiences and Expectations Research (VEER), 2022-23

Published by Tourism WA, May 2024

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