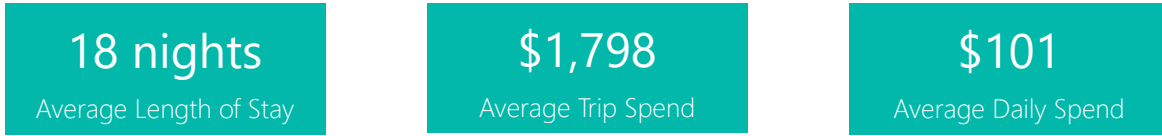


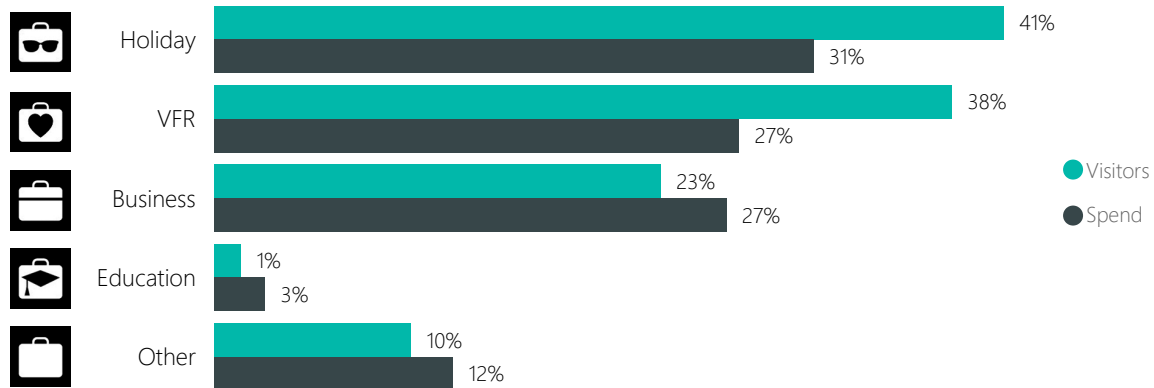
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MARKET OVERVIEW

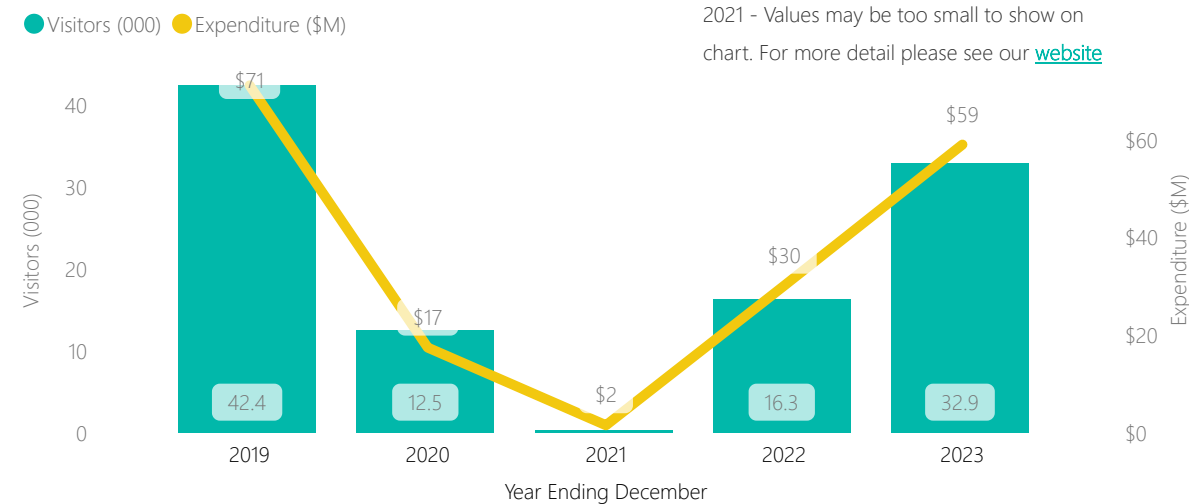
Leisure Visitation to WA¹



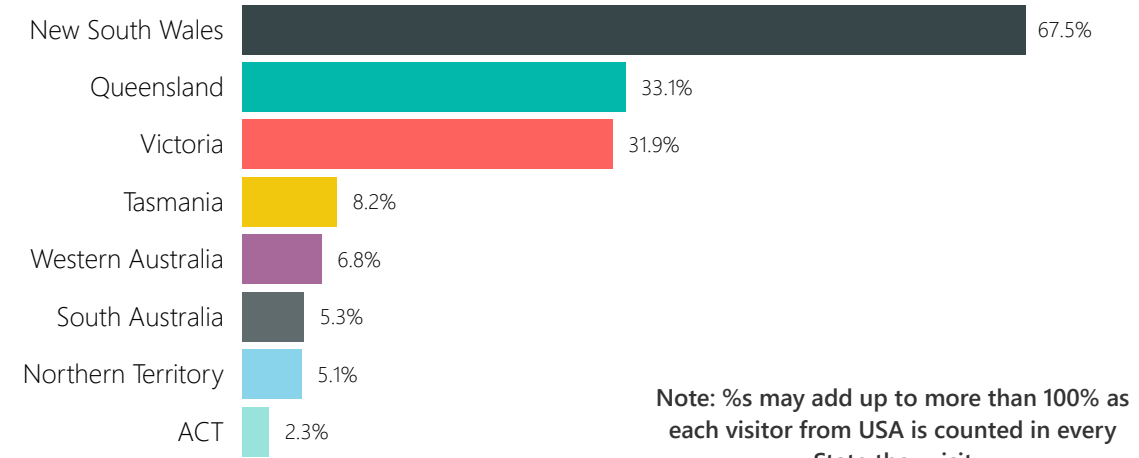
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

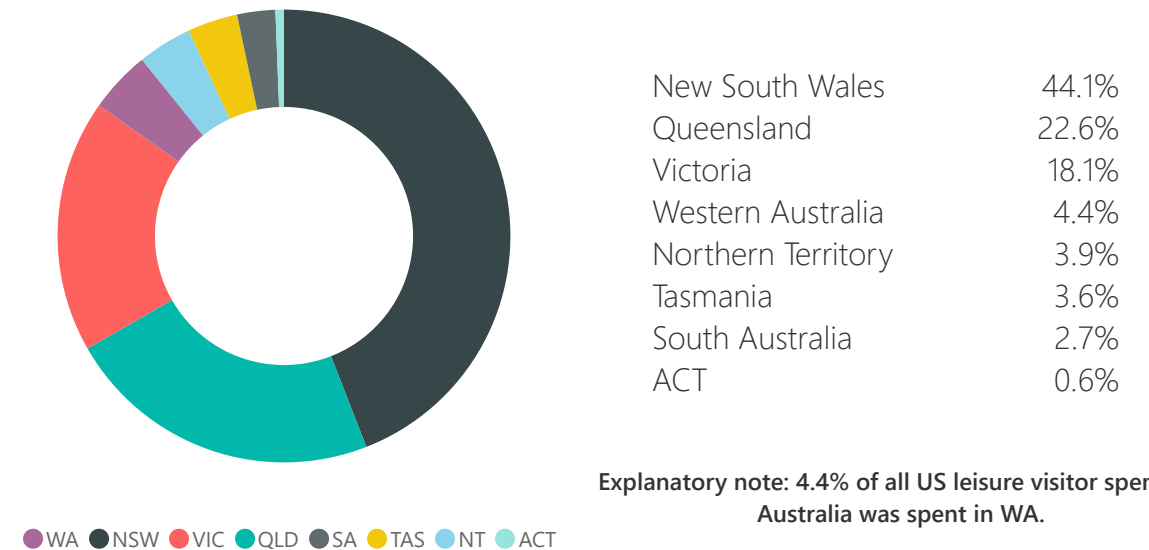


Market Share of International Leisure Visitors to Australia¹



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

Market Share of International Leisure Visitor Spend in Australia¹

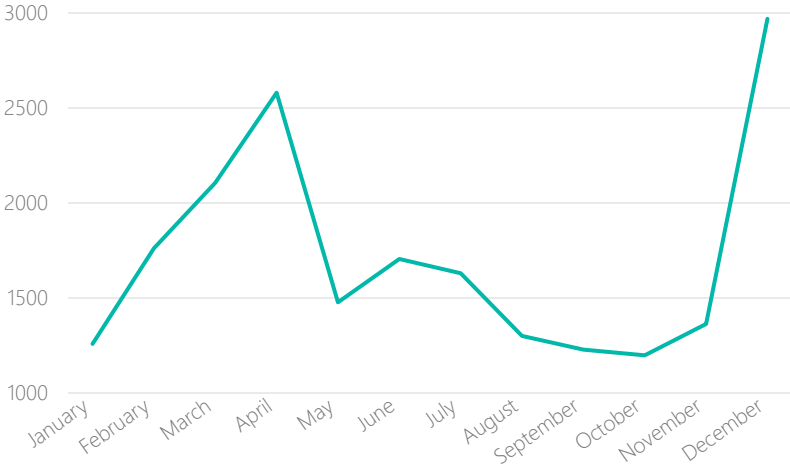


Explanatory note: 4.4% of all US leisure visitor spend in Australia was spent in WA.

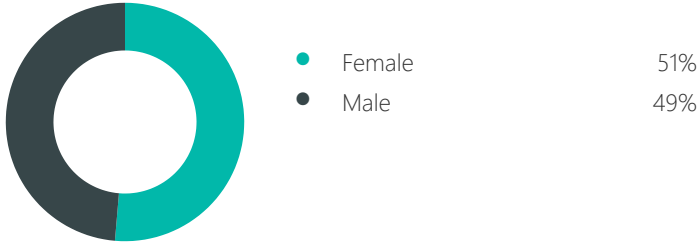
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TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

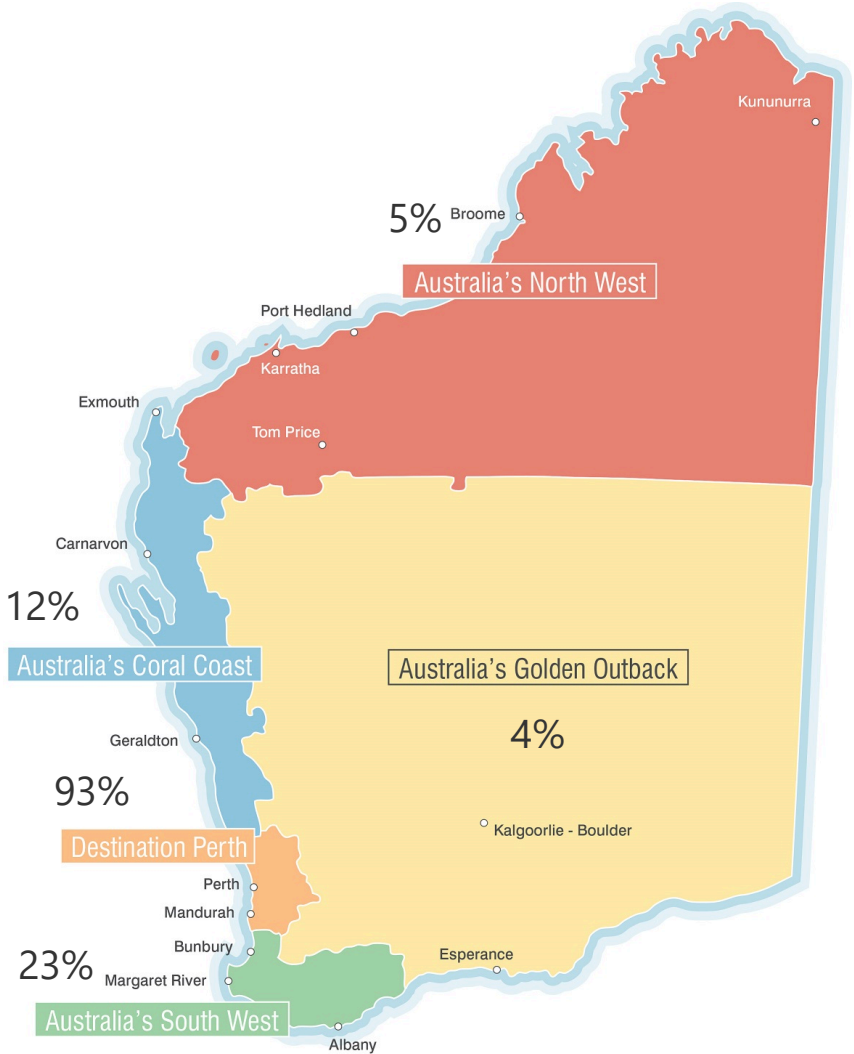
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



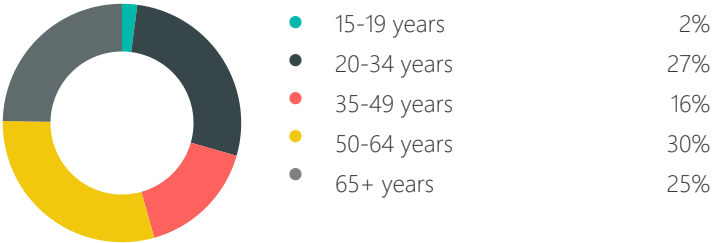
Gender³



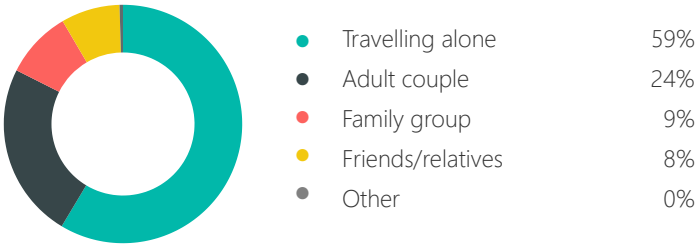
Regional Dispersal³



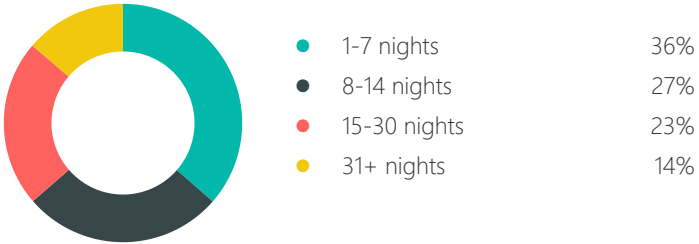
Age³



Travel Party³



Length of Trip³



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TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

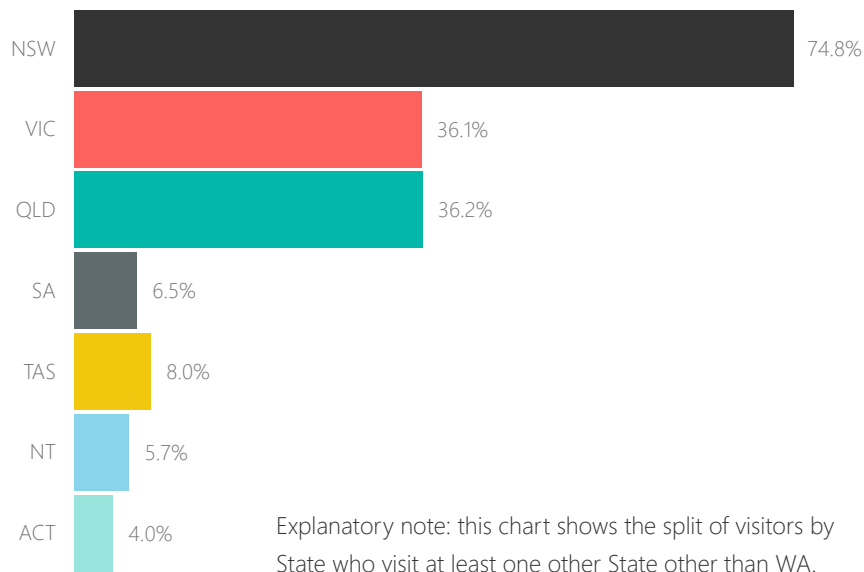
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 93% |
| ② | Go shopping for pleasure | 77% |
| ③ | Go to the beach | 81% |
| ④ | Sightseeing/looking around | 83% |
| ⑤ | Visit national parks / state parks | 65% |

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

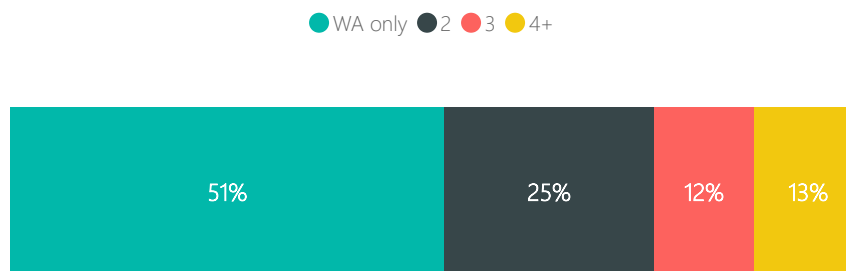
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| ① | Other Private Accommodation | 63% |
| ② | Friends or relatives property | 54% |
| ③ | Hotel/resort/motel or motor Inn | 37% |

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

59% 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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IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

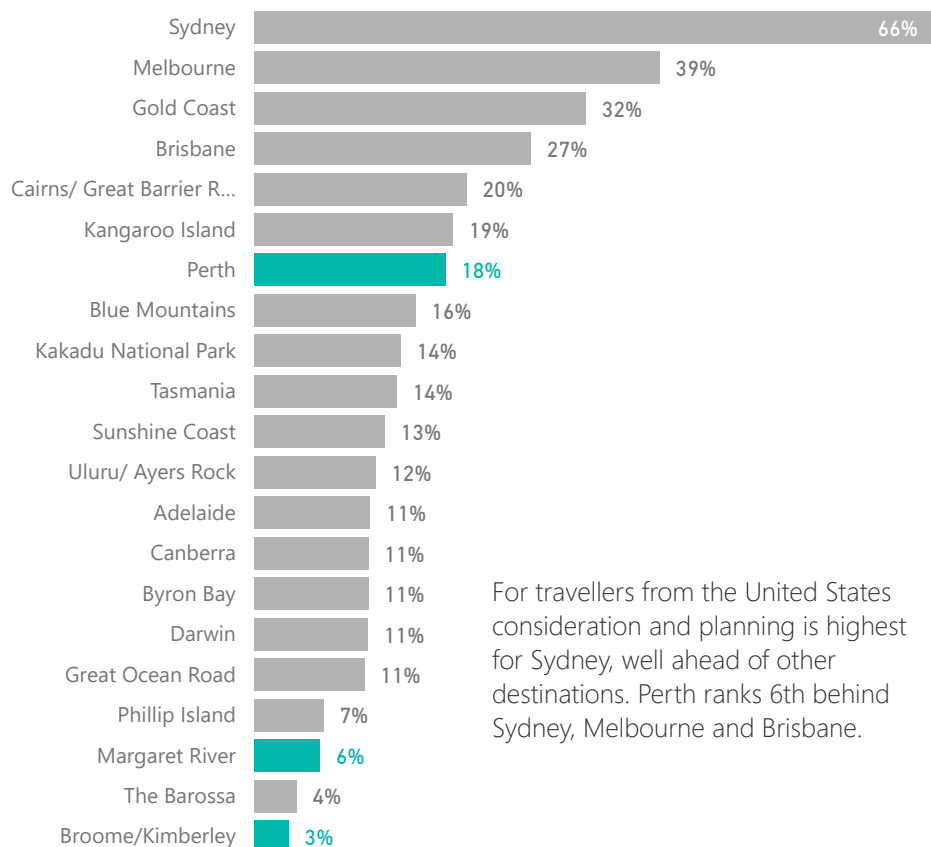
Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

Consideration of Australian Destinations ⁵

(those considering a trip to Australia in the next 4 years)



For travellers from the United States consideration and planning is highest for Sydney, well ahead of other destinations. Perth ranks 6th behind Sydney, Melbourne and Brisbane.

Which factors are most important when choosing a destination ⁵

- ① A safe and secure destination 44%
- ② Value for money 36%
- ③ Good food, wine/beverages, local cuisine and produce 27%
- ④ Beautiful natural environments e.g. mountains, rivers, forests 27%
- ⑤ Appealing climate or weather 26%
- ⑥ Clean and hygienic 24%

United States travellers state that they are looking for a holiday destination that is safe and secure and has good value for money, but they also want good food/wine and beautiful natural environments.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	44%	28%	15%	15%	8%	8%
A vibrant city lifestyle	53%	36%	20%	19%	5%	6%
Beautiful natural environments	22%	18%	11%	12%	14%	7%
Different and interesting local wildlife	20%	16%	12%	10%	10%	9%
Good food, wine/beverages	48%	33%	20%	17%	8%	7%
Interesting events and festivals	43%	28%	16%	16%	6%	6%
Value for money	31%	21%	11%	13%	7%	5%

Sydney and Melbourne compete strongly with associations of a vibrant city lifestyle & good food/wine, while Perth follows a similar pattern to Brisbane in all categories.

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NOTES & REFERENCES

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
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 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

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