

# Destination Perth Research Insights 2024

February 2025

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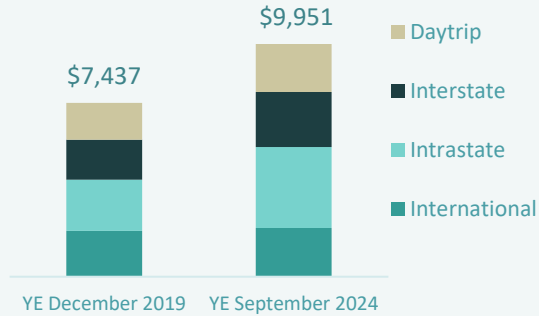
Current data relates to YE September 2024



# Destination Perth Insights Summary

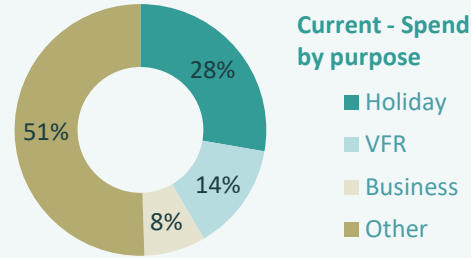
## Total Visitor Spend (\$M)

Pre-COVID (2019) to latest



## Market Characteristics

Intrastate Leisure Overnight



### Current - Spend by purpose

- Holiday
- VFR
- Business
- Other

\*Other spend includes 50% of return flight spend on flights which departed from Destination Perth to any overnight destination including interstate and international.

### Solo travellers

Intrastate leisure visitors to DP cover all age groups and households, but over-index for solo travellers

Intrastate leisure visitation in the region is skewed towards holiday. VFR has declined since pre COVID.

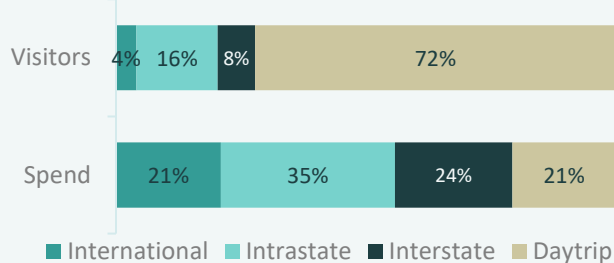
**Holiday** ↑  
**VFR** ↓

### Multiple Segments

The hero destinations in the region – Perth, Mandurah and Rottnest – appeal to distinct trip-based segments

## Visitor Market Mix

Latest – YE September 2024



## About their trip

Intrastate Leisure Overnight

**\$242 per night**

Significant increase in average daily spend since COVID, second highest behind Australia's North West

Almost all trips in Destination Perth are mono-destination. Perth City itself is most popular

**Mono-destination**

### Intra-regional

Almost three out of five intrastate leisure visitors live within the Destination Perth region aka intra-regional trips

Significant increase in nights spent in hotel accommodation compared to pre-COVID

**Hotels on the up**





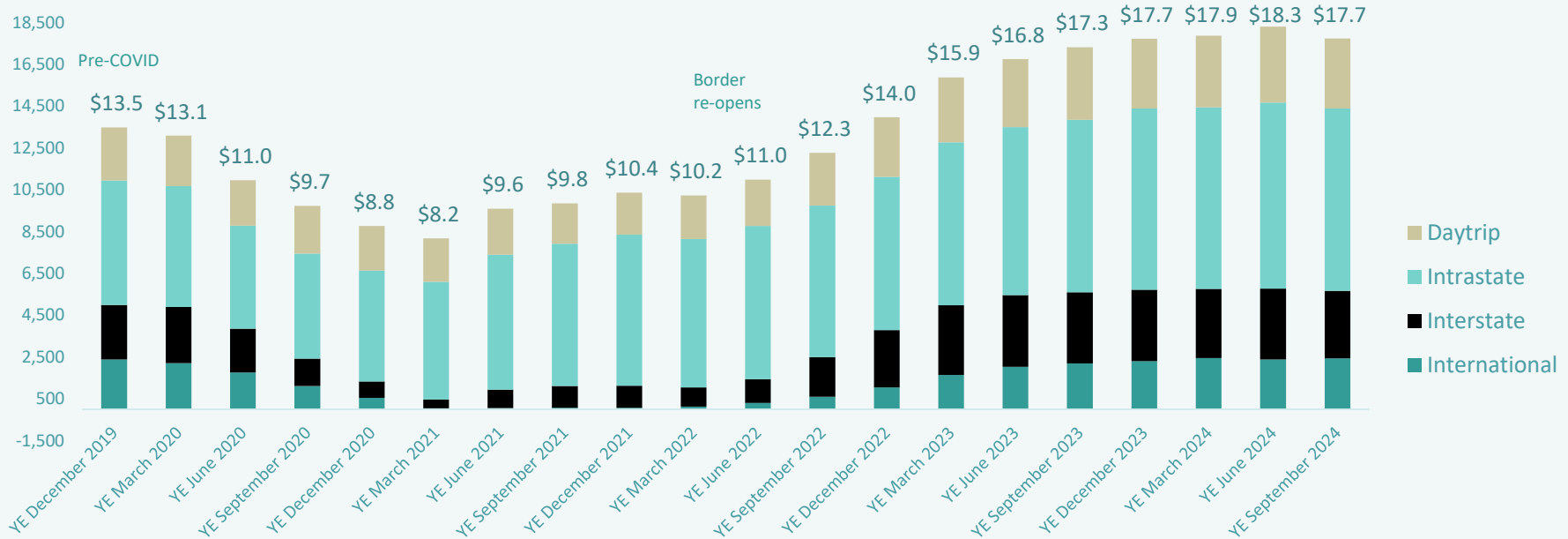
## Recent Tourism Trends

# Western Australia – Total Spend

Total visitor spend in WA reached \$17.7 billion in the latest release – Year Ending September 2024 – which is 32% ahead of pre-COVID (YE Dec 2019).

Intrastate overnight and daytrip spend is well ahead of pre-COVID, up +47% and +32% respectively. Interstate spend is also up +23%. International has been recovering steadily since border re-opening and now sits +3% above 2019 levels.

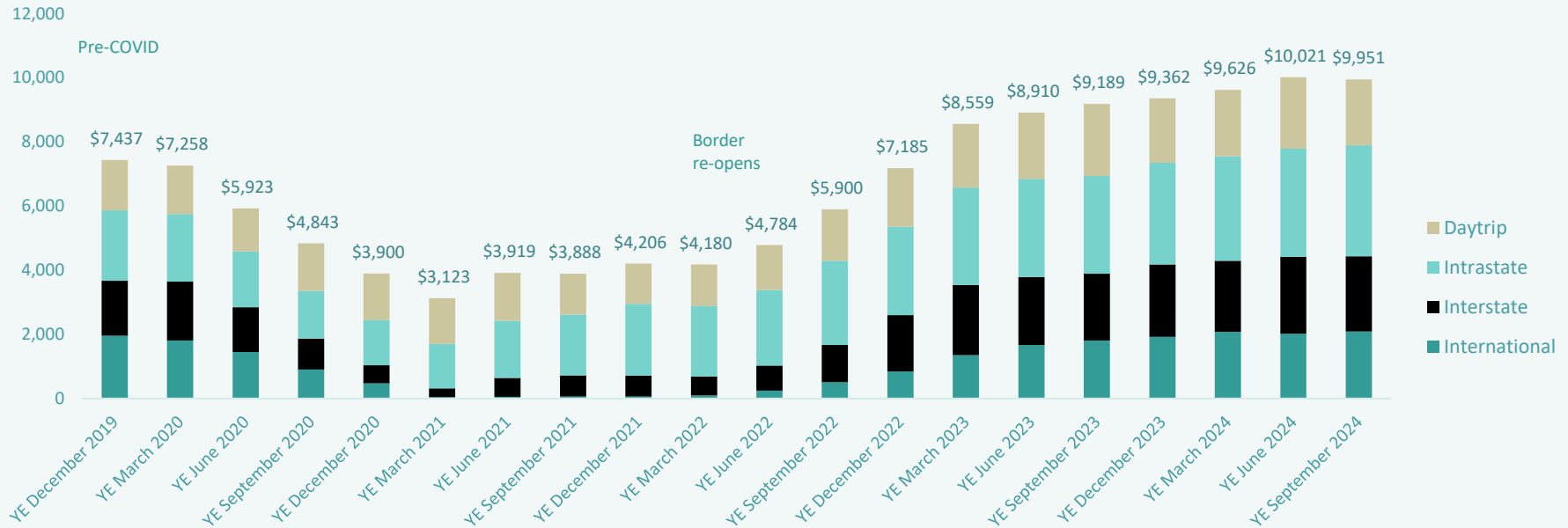
Total Spend in WA - Overnight + Daytrips \$Ms – Rolling Annual



# Destination Perth – Total Spend

Total visitor spend in Destination Perth reached \$10.0 billion in the latest release – Year Ending September 2024 – which is 34% ahead of pre-COVID. Growth in spend has been driven by the domestic market; intrastate (+58%), interstate (+37%), and daytrips (+31%). International spend in Destination Perth has now recovered and is ahead of pre-COVID by (+) 7% (\$2.1 billion in YE September 2024 compared to \$2.0 billion in 2019).

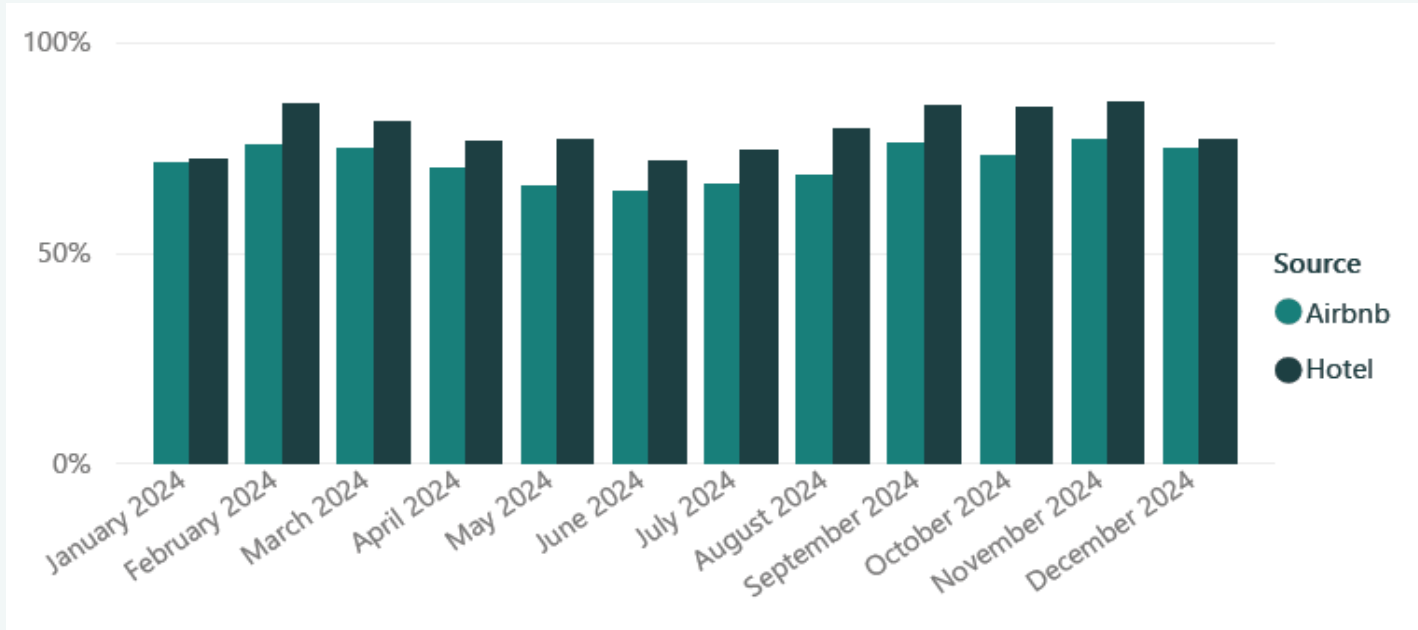
Total Spend in **Destination Perth** - Overnight + Daytrips \$Ms – Rolling Annual



# Occupancy Rates

The monthly accommodation dashboard shows occupancy rates in Destination Perth hotels averaged 79% in 2024 (up from 73% pre COVID).

Occupancy in hotels was highest in February, September, October and November. Occupancy trends in Airbnbs followed a similar pattern with an average of 71% for 2024.



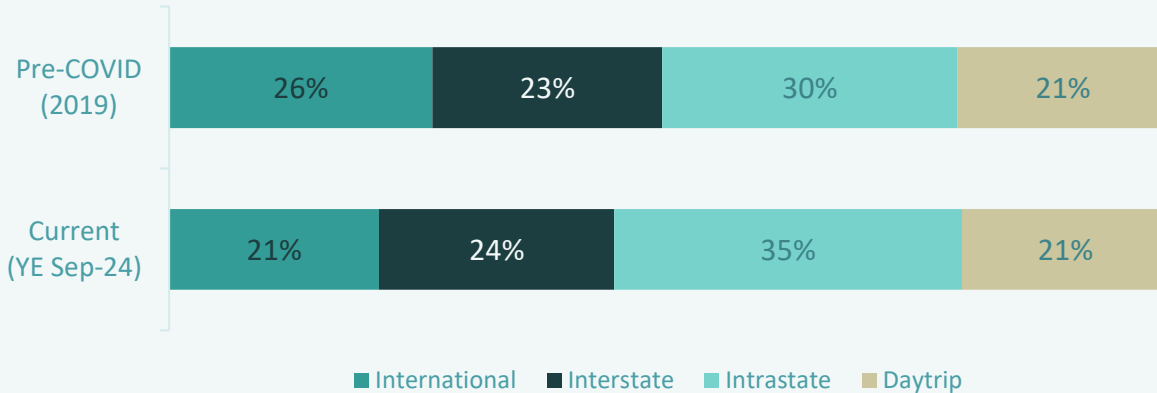
Source: AirDNA Monthly Trend Report - Western Australia. Sample size n=100% of census (4,981 properties). STR, Australian Accommodation Monitor - Tourism WA. Sample size n=13,380 rooms (out of 17,133 of census). "Hotel" includes hotel, motel, serviced apartment or cabins in caravan parks of 10+ rooms. "Airbnb" includes short-term rental of entire properties bookable on Airbnb or Home and Away

# Destination Perth Market Mix

Destination Perth has the most 'even split' of source markets out of all five tourism regions in the State. The intrastate overnight visitor market accounts for the largest share at 35% (up from 30% pre-COVID), while a fifth of spend in the region continues to come from daytrip visitors. The top 5 international markets are similar now as they were pre-COVID, though New Zealand has replaced USA.

The remainder of this report focuses on the intrastate leisure market.

Spend by Market – Pre-COVID vs. Current



## Top International Markets

Pre-COVID:	Current
1. China	1. China
2. Singapore	2. Singapore
3. United Kingdom	3. United Kingdom
4. Malaysia	4. Malaysia
5. USA	5. New Zealand



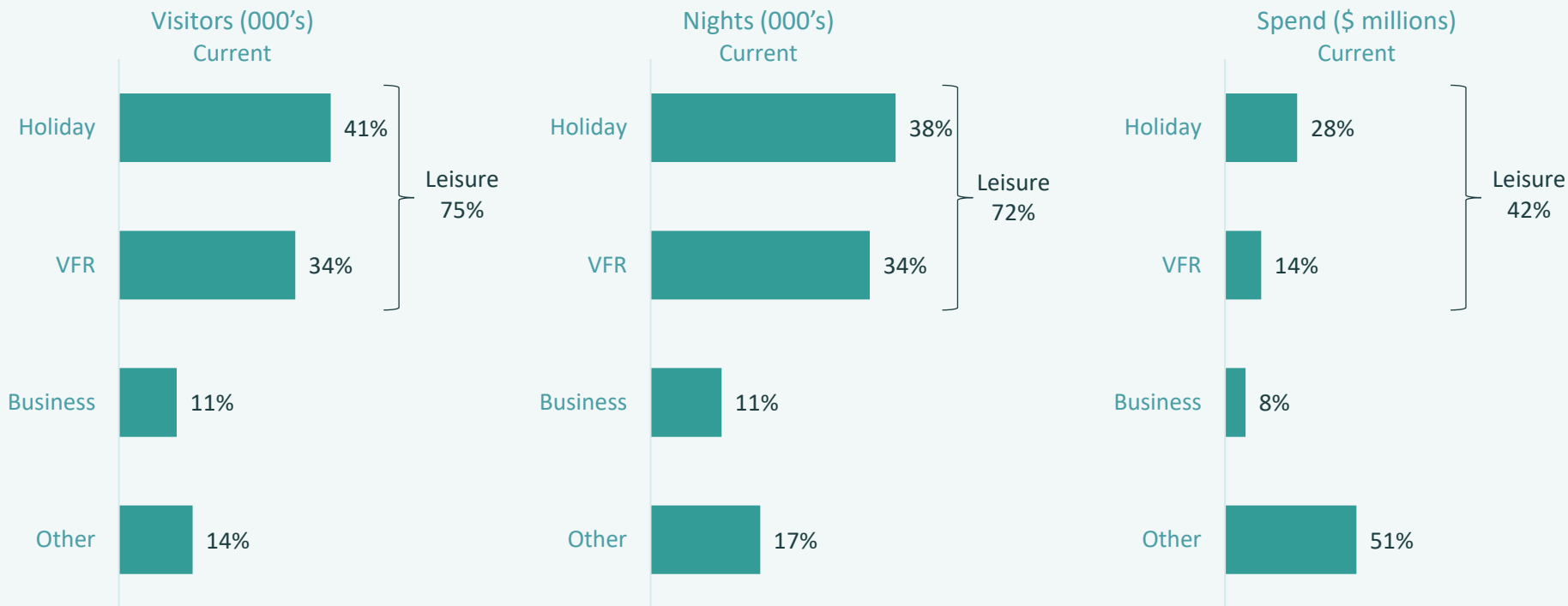


Intrastate Overnight  
Leisure Visitor  
Profile & Behaviour

# Intrastate Overnight - Purpose of Visit

The majority of intrastate visitors to/within Destination Perth are leisure visitors, with slightly more holiday than VFR.

Note "Other" spend looks significant as it includes 50% of return flight spend on flights which departed from Destination Perth. This could include spend by Perth locals on travel to interstate or international destinations.

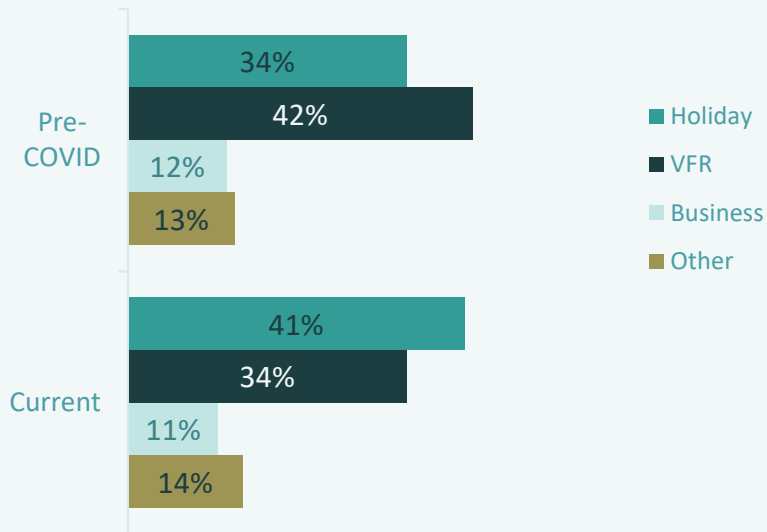


\*Other spend includes 50% of return flight spend on flights which departed from Destination Perth to any overnight destination including interstate and international.

# Intrastate Overnight - Purpose of Visit

The profile of intrastate visitors remains driven by leisure; however, the proportion of holiday has grown, and VFR declined. Intrastate growth has been driven by the holiday sector, which has seen an increase in volume of visitors, length of stay, AND average daily spend. VFR visitation and nights have declined, and business visitation has dipped slightly in the latest release.

### Purpose of Visit – Visitors to DP



### Intrastate Overnight – % Change since Pre-COVID

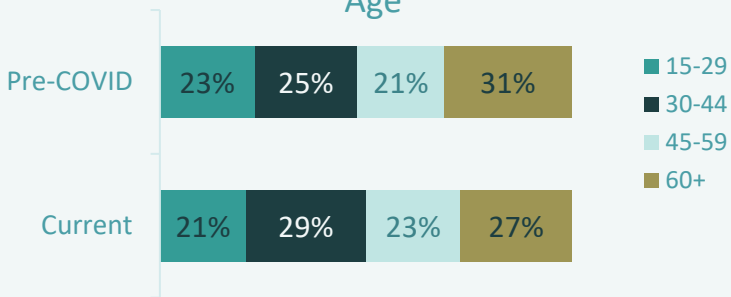
	Visitors	Nights	Spend
Holiday	19%	21%	84%
VFR	-19%	-17%	43%
Business	-4%	-8%	30%
Other*	7%	12%	55%
Total	-1%	1%	58%

\*Other spend includes 50% of return flight spend on flights which departed from Destination Perth to any overnight destination including interstate and international.

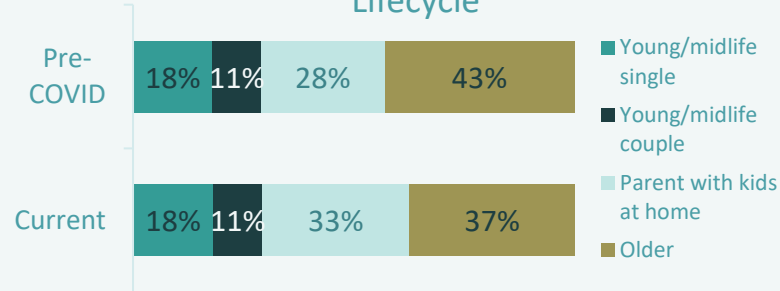
# Intrastate Leisure Visitor Profile

The profile of intrastate leisure visitors to the region has changed compared to pre-COVID. Gender split is now skewed towards male rather than female. The region attracts a mix of age groups and household types although skewing towards younger families, and over 70% are working.

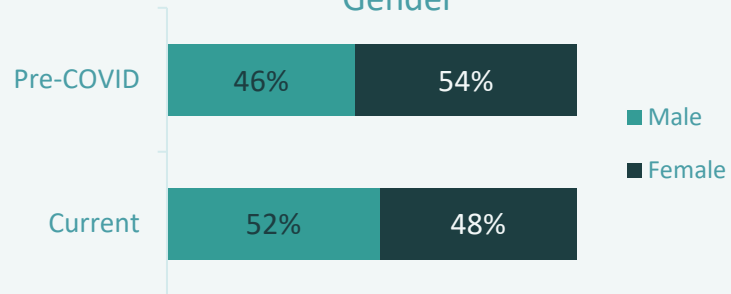
### Age



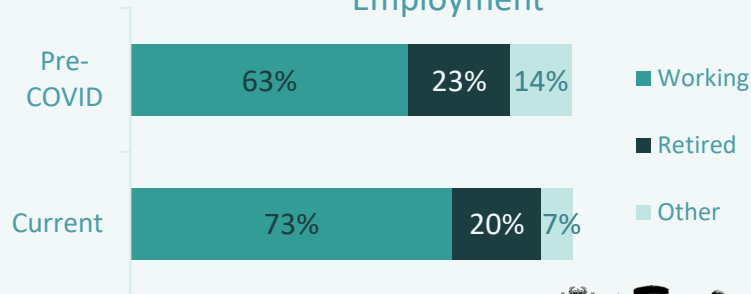
### Lifecycle



### Gender



### Employment

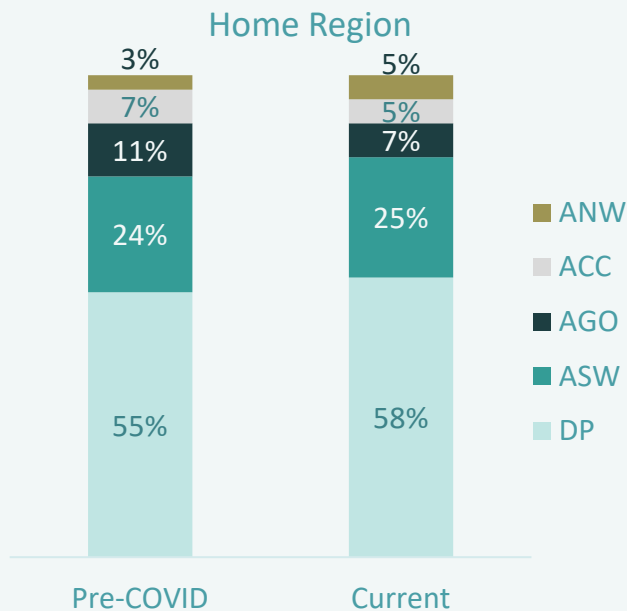


# Home Region

Three out of five intrastate leisure visitors in Destination Perth are intra-regional visitors, that is to say Perth residents travelling within the Destination Perth region. ASW residents account for a quarter of intrastate leisure visitors. This is consistent with pre-COVID.

The top LGAs generally reflect the cities with the largest population sizes.

*Note: "visitors" must travel at least 40kms away from home and spend at least one night away from home to be counted.*



## Visitor Home LGA (Top 15)

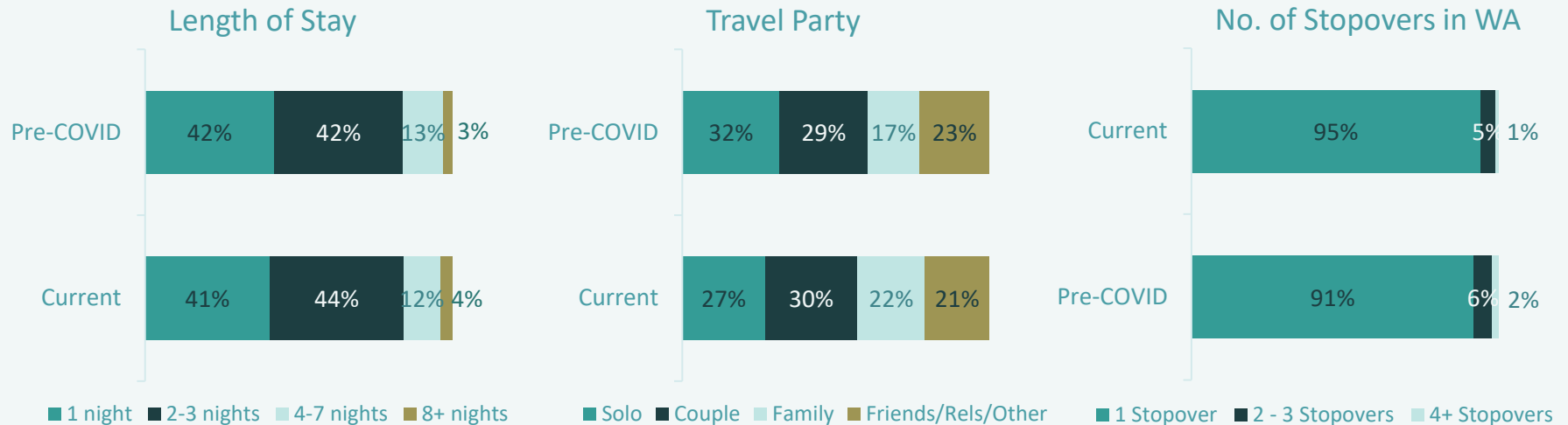
	Pre-COVID	Current
Mandurah (C)	5%	6%
Busselton (C)	4%	5%
Joondalup (C)	3%	5%
Stirling (C)	5%	5%
Albany (C)	4%	4%
Bunbury (C)	5%	3%
Wanneroo (C)	3%	3%
Armadale (C)	2%	3%
Rockingham (C)	5%	3%
Melville (C)	2%	3%
Harvey (S)	3%	3%
Kalgoorlie/Boulder (C)	3%	2%
Greater Geraldton (C)	5%	2%
Swan (C)	2%	2%
Dandaragan (S)	1%	2%

\*Data in orange has a small sample (n<40) and should be used with caution.

• Source: Tourism Research Australia, National Visitor Surveys. Pre-COVID is 2019. Current is YE September 2024.

# Trip Details

The majority of intrastate leisure trips to/within Destination Perth are short breaks of 1 – 3 nights. Destination Perth is more likely than any other region to attract solo travellers although this group has declined since pre COVID; 27% of intrastate leisure visitors in Destination Perth are travelling solo. The vast majority are on mono-destination trips.



# LGA's Visited

City of Perth is the most popular LGA within the Destination Perth region, followed by Mandurah. A long tail of LGAs follows.

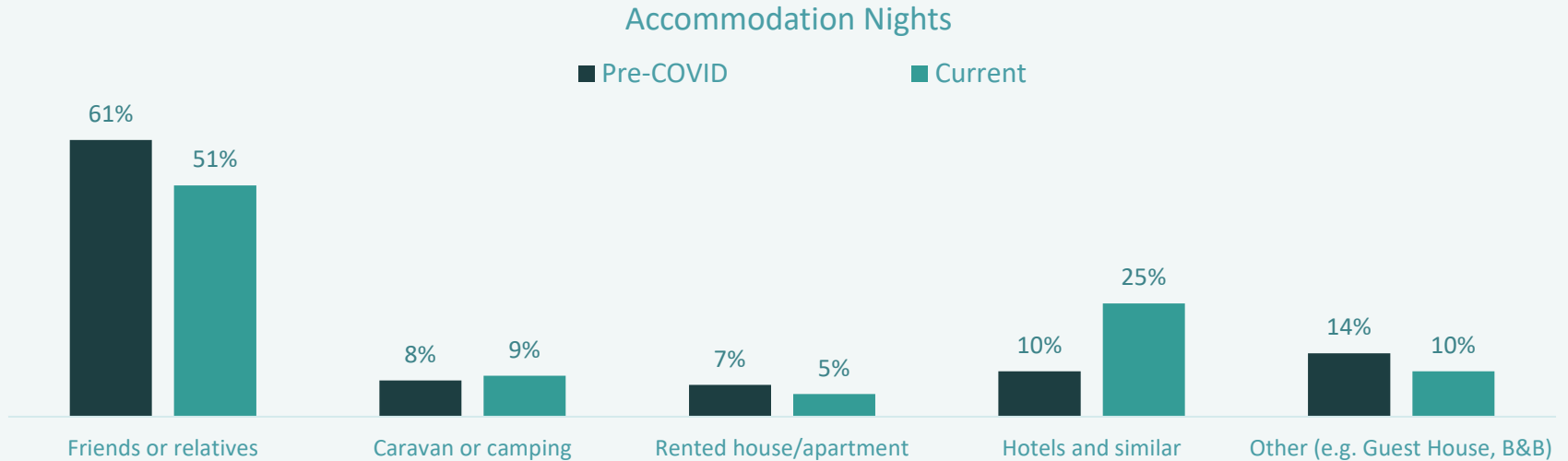
## LGA Visited (% of Intrastate Leisure Visitors to DP, Top 15 LGAs)

	Pre-COVID	Current
Perth (C)	24%	32%
Mandurah (C)	15%	15%
Murray (S)	5%	7%
Swan (C)	5%	7%
Cockburn (C)	4%	5%
Wanneroo (C)	5%	4%
Rockingham (C)	5%	3%
Fremantle (C)	3%	3%
Joondalup (C)	2%	3%
Stirling (C)	4%	2%
York (S)	3%	2%
Northam (S)	1%	2%
Victoria Park (T)	2%	2%
Serpentine-Jarrahdale (S)	1%	2%
Melville (C)	1%	2%

\*Data in orange has a small sample (n<40) and should be used with caution.

# Accommodation

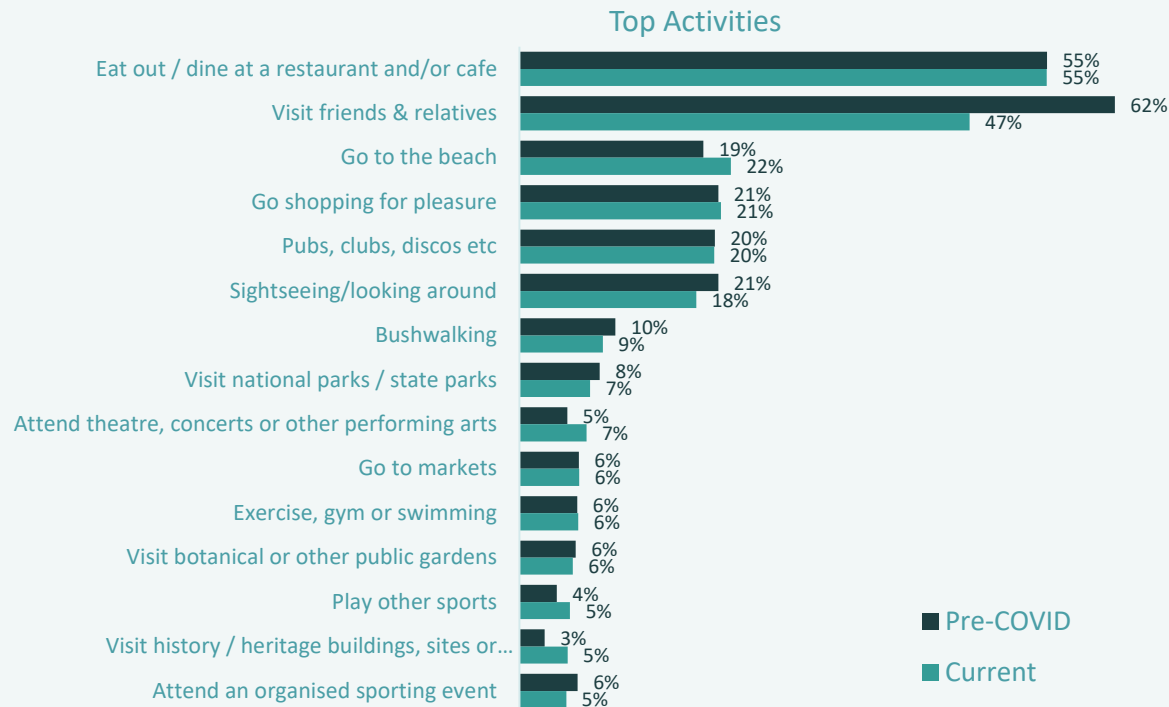
The home of a friend or relative remains the most popular accommodation used in Destination Perth by intrastate leisure visitors, though has dropped off since COVID in alignment with the softening in VFR visitation. Share of nights spent in hotels has increased from 10% to 25%, with growth across both 4 – 5 star luxury hotels and standard hotels.





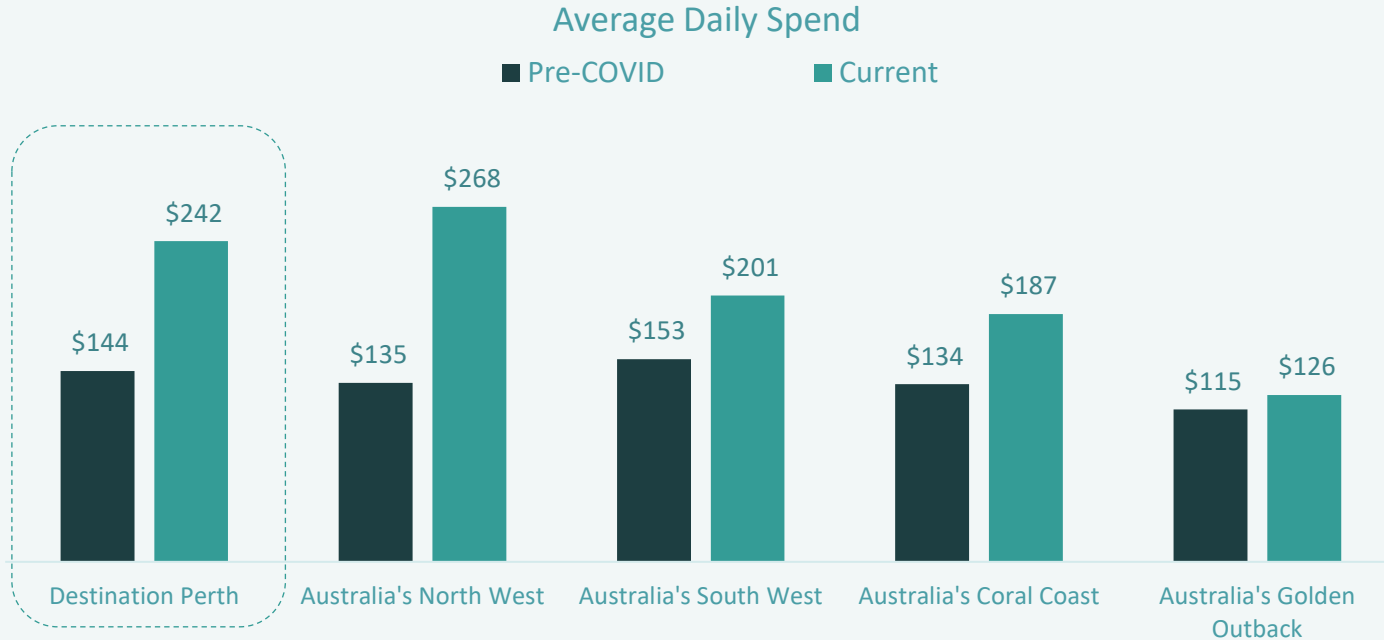
# Activities

After eating out, VFR, going to the beach and shopping are the most common activities. VFR has decreased by 15% points, aligning with the drop in VFR visitation, though still over-indexes relative to other regions.



# Average Spend

Intrastate leisure visitors to Destination Perth spend on average \$242 per night, well above the WA average of \$205. Compared to pre-COVID, average daily spend in Destination Perth has increased by a significant 68% (which compares to a state-wide average of 50%). Average daily spend of intrastate leisure visitors is second highest in Destination Perth, which is the same as metric pre-COVID.



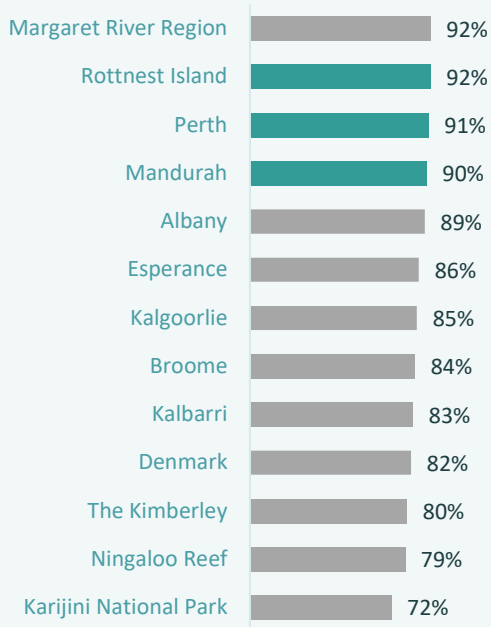


# Consumer Insights - Intrastate

# Purchase Funnel

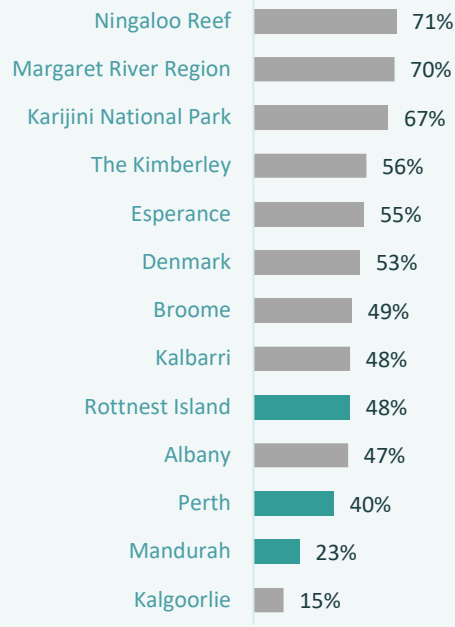
Perth, Mandurah and Rottnest have strong awareness (as expected), but rank lower in the list for desire. Rottnest performs strongly for consideration, whereas Perth and Mandurah rank much lower consideration.

## Awareness



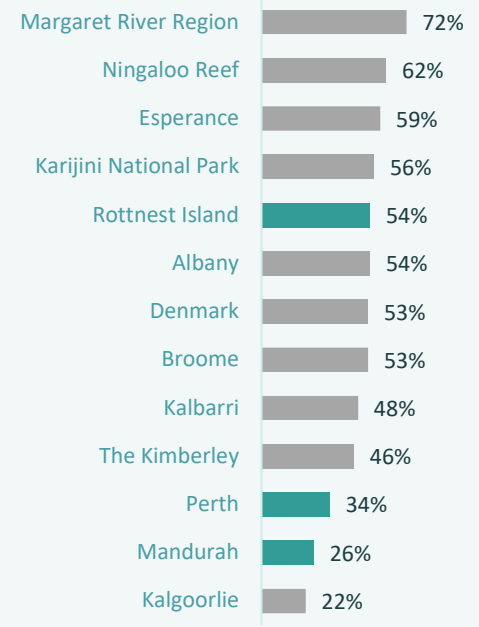
## Desire

(% aware of destination who rated 8 – 10 out of 10)



## Consideration

(% aware of destination who are considering visiting in future)



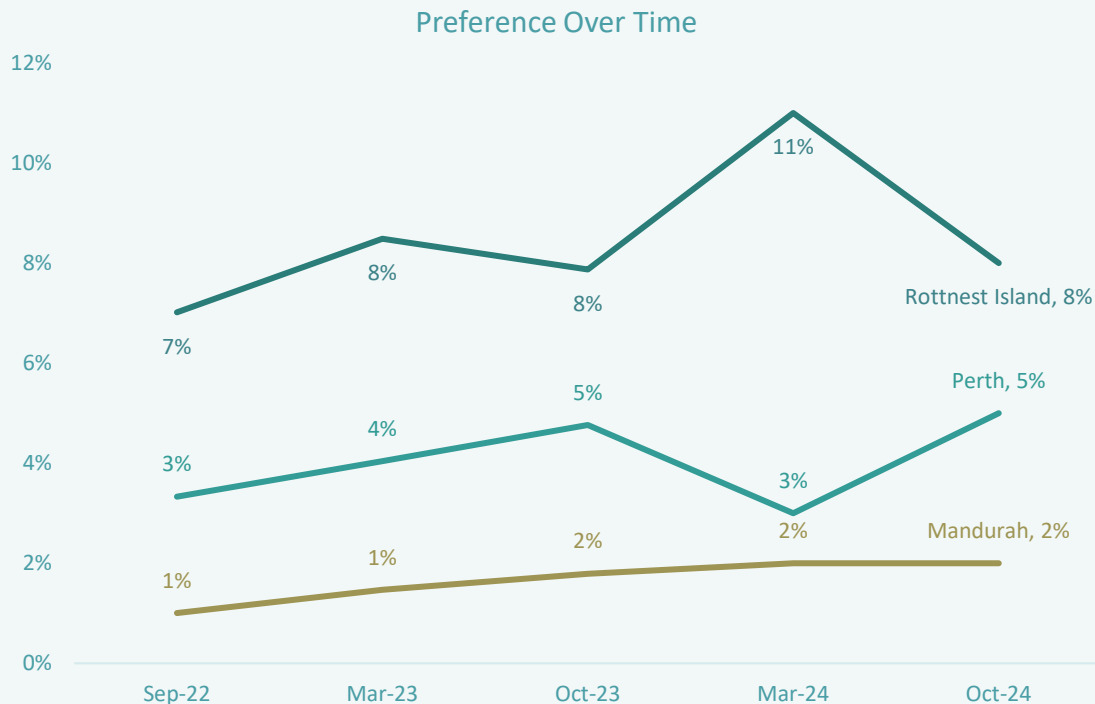
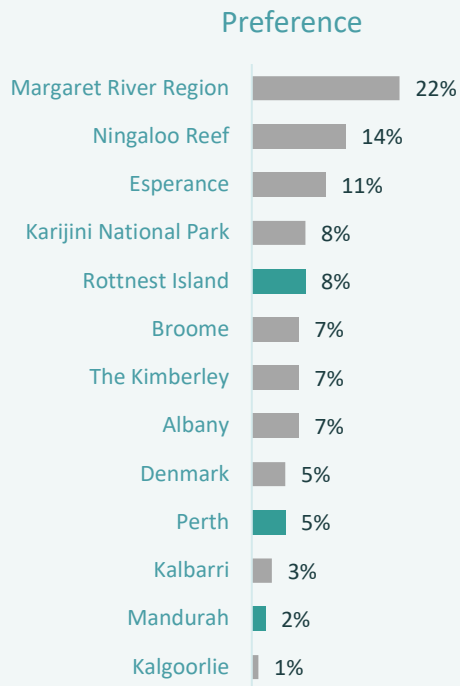
Source: Painted Dog: Brand Tracker, Intrastate, October 2024

- Q15. Which of these Western Australian destinations have you heard of before today? (multi-response). Q17. Thinking about all the factors you take into account when booking a holiday, how desirable are each of these Western Australian locations as a holiday destination? (Rebased to those aware of destination). Q18 Which of these Western Australian destinations would you consider visiting for a holiday sometime in the future? (Rebased to those aware of destination). Total Intrastate Sample n=811.



# Preference

Preference for Perth and Mandurah increased marginally over the last year (around 1% from 2023 to 2024). Preference for Rotttnest peaked in March 2024 cycle but subsequently normalised.



# Purchase Funnel Ranking

The numbers in the table below represent the rank of each destination, out of 13 WA hero destinations, throughout the purchase funnel. This is the same data as the previous two slides, just displayed in a different way and adding in the 'booked' (upcoming holiday) metric. This analysis can guide which parts of the funnel need the most attention for each destination.

All three Perth destinations could benefit from 'middle of the funnel' activity; building desire and consideration. They all perform stronger for bookings than for middle of the funnel metrics, suggesting they are benefiting from a lack of barriers that other WA destinations experience (time and distance).

	Margaret River Region	Perth	Rottnest Island	Ningaloo Reef	Mandurah	Albany	Kalbarri	Esperance	Denmark	Karijini National Park	Broome	The Kimberley	Kalgoorlie
Awareness	1	3	2	12	4	5	9	6	10	13	8	11	7
Desire	2	11	9	1	12	10	8	5	6	3	7	4	13
Consideration	1	11	5	2	12	6	9	3	7	4	8	10	13
Preference	1	10	5	2	12	8	11	3	9	4	6	7	13
Booked*	1	2	5	8	6	3	9	4	7	13	10	11	12

Rank amongst those who have an upcoming holiday in WA booked, as at October 2024. Sourced from Brand Tracker.

# Associations

In the table below, green represents the destinations most associated with the attribute, and red represents the destinations least associated with the attribute. The %s reflect the % of the intrastate market who associate the destination with that attribute.

Perth has clear strengths that are more ‘functional’; easy to plan and book, plenty of accommodation, and easy to get to and around. It also performs strongly for accommodation and events. Conversely, it is not associated as offering unique places or experience, or unspoilt nature and wildlife. Rottnest has mid to high association across the board, though has the lowest score for being ‘uncrowded’ (possibly reflecting the very high popularity of the Island over the last few years). Mandurah’s strongest associations are related to ease and being family friendly. Rottneest has mid to high association across the board, though has the lowest score for being ‘uncrowded’ (possibly reflecting the very high popularity of the Island over the last few years). Mandurah’s strongest associations are related to ease and being family friendly.

	Perth	Rottnest Island	Mandurah	Margaret River Region	Albany	Denmark	Esperance	Kalgoorlie	Kalbarri	Ningaloo Reef	Karijini National Park	Broome	The Kimberley
A place where I can relax and unwind	31%	57%	37%	69%	46%	51%	53%	23%	45%	45%	31%	45%	28%
Aboriginal experiences	14%	18%	13%	16%	14%	12%	15%	37%	31%	32%	64%	47%	62%
Active adventures and experiences	30%	52%	24%	45%	27%	27%	34%	24%	40%	62%	57%	39%	47%
Beaches and coastal experiences	38%	73%	40%	62%	53%	41%	70%	5%	44%	65%	5%	58%	8%
Bucket-list experiences	14%	31%	10%	24%	15%	13%	24%	12%	21%	63%	54%	31%	40%
Easy to get to, and around	72%	45%	56%	54%	32%	30%	25%	23%	22%	14%	14%	19%	13%
Easy to plan and book	73%	57%	61%	69%	55%	47%	48%	42%	43%	38%	37%	43%	36%
Family friendly / great for kids	55%	75%	58%	63%	44%	40%	42%	23%	42%	39%	29%	34%	24%
Great food and / or local produce	43%	19%	28%	86%	34%	35%	24%	15%	20%	16%	15%	23%	15%
Great wineries, breweries and / or distilleries	23%	3%	9%	91%	16%	23%	9%	3%	4%	3%	3%	7%	3%
Not crowded with other tourists	17%	11%	20%	15%	28%	28%	30%	28%	19%	18%	23%	13%	26%
Organised events	69%	19%	30%	55%	18%	13%	13%	14%	11%	12%	12%	21%	12%
Plenty of available accommodation	72%	27%	48%	61%	41%	36%	33%	30%	30%	24%	23%	37%	25%
Premium accommodation options	65%	35%	25%	66%	23%	22%	23%	15%	21%	25%	19%	41%	19%
Road trips	29%	19%	37%	68%	65%	59%	61%	52%	58%	41%	46%	42%	43%
Truly unique places and experiences	19%	46%	16%	37%	27%	24%	36%	24%	36%	73%	69%	38%	56%
Unspoilt nature and local wildlife	10%	40%	10%	34%	23%	28%	34%	15%	36%	65%	73%	24%	59%
Value for money (worth what it costs to visit)	37%	24%	33%	42%	34%	31%	30%	19%	25%	25%	24%	18%	21%

Source: Painted Dog: Brand Tracker, Intrastate, October 2024

# Segments

The Tourism WA trip-based segments by purchase funnel results give an indication of potential target segments for the destinations (though noting these are based on fairly small sample sizes; we will investigate this further in the next Brand Tracking Deep Dive):

- Family Time: performs well throughout the funnel for all three hero destinations.
- Relax & Recharge: opportunity for top of the funnel activity for all three hero destinations to drive awareness.
- Simple Nature: Mandurah could benefit from some middle of the funnel activity.

	Luxe Culture	Premium Nature	Simple Nature	Relax & Recharge	City Social	Family Time
<b>Perth</b>						
Awareness	89%	92%	91%	88%	91%	94%
Desirability	43%	34%	23%	41%	40%	42%
Consideration	39%	25%	31%	40%	34%	35%
Preference	4%	3%	3%	9%	10%	4%
Visitation (ever)	84%	84%	85%	85%	86%	87%
<b>Rottneest Island</b>						
Awareness	94%	91%	91%	90%	88%	92%
Desirability	42%	47%	37%	48%	38%	53%
Consideration	51%	54%	50%	55%	57%	67%
Preference	11%	3%	7%	5%	11%	11%
Visitation (ever)	26%	25%	30%	36%	31%	28%
<b>Mandurah</b>						
Awareness	90%	89%	89%	84%	88%	93%
Desirability	21%	15%	16%	27%	16%	26%
Consideration	29%	20%	25%	34%	22%	29%
Preference	3%	1%	2%	2%	0%	2%
Visitation (ever)	59%	53%	64%	68%	55%	65%



# APPENDIX

# Economic Value of Tourism in DP

Tourism accounts for 4.8% of total filled jobs in Destination Perth (60,700 jobs).

There were nearly 5.4 million overnight visitors to Destination Perth in YE Sep 2024 who, together with day-trippers, spent \$9.95 billion in the region.

**\$6,432 million<sup>1</sup>**

Gross Value Added\*

*2.3% of region's total GVA*  
2022-23

**\$7,134 million<sup>1</sup>**

Gross Regional Product\*

*2.5% of region's total GRP*  
2022-23

**60,700<sup>1</sup>**

Tourism Filled Jobs\*

*4.8% of region's total employment*  
2022-23

**25,058<sup>2</sup>**

Tourism businesses

June 2023

**5,395,000<sup>3</sup>**

Overnight visitors

YE Sep 2024

**\$9.95 billion<sup>3</sup>**

Total visitor spend  
overnight + daytrip in YE Sep 2024

# Consideration - Interstate

The **Interstate** market's consideration of WA's hero destinations has remained stable over the last 6 months.

Perth continues to lead as the most considered WA destination, hovering around the 60% mark.

