



Tourism Western Australia

# International Market Profiles Year Ending December 2015

Prepared by the Research Team

March 2016



## About this report

This report profiles visitors to Western Australia from key international source markets; markets Western Australia has a marketing presence in, as well as key emerging markets. The source of the data is Tourism Research Australia's *International Visitor Survey* (more details on page 16). As with all surveys, the visitation estimates have an associated margin of error – see notes at the foot of each page for confidence intervals that should be applied to the visitation estimates.

To jump to the profile page of a specific market, click on the hyperlinks below. To return to this page, click 'back to top' in the upper right hand corner of each page.

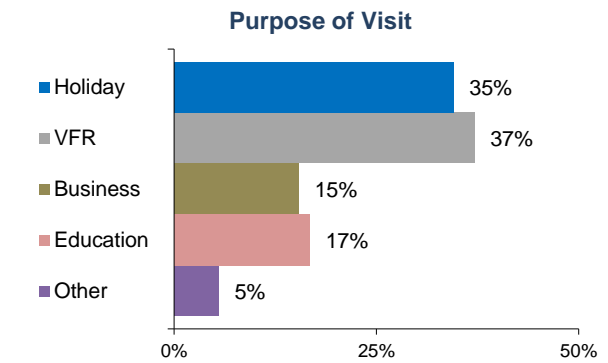
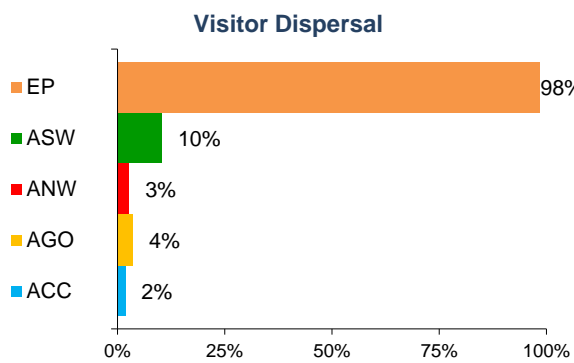
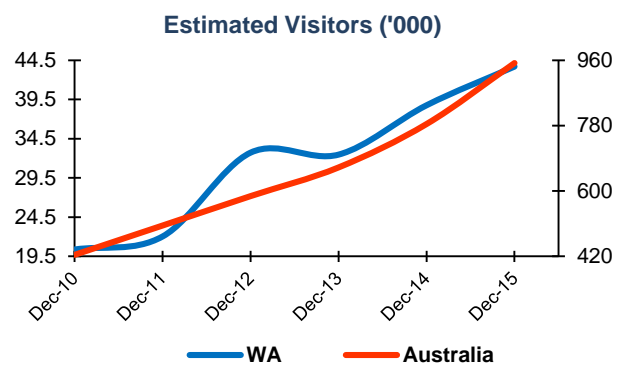
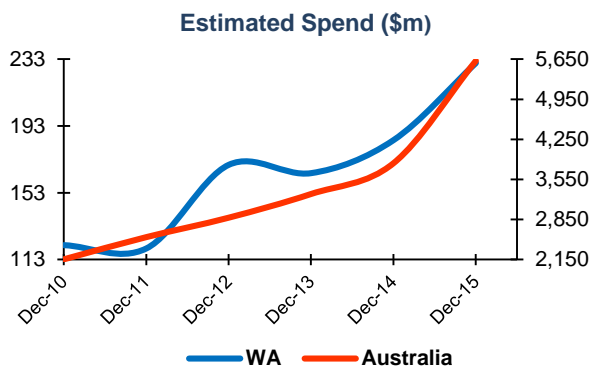
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China

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$185	\$231	25.0%	18.3%
Estimated Visitors	38,800	43,700	12.6%	16.0%
Estimated Nights	1,894,900	2,054,000	8.4%	15.3%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$3,835	\$5,625	46.6%	30.6%
Estimated Visitors	784,300	952,400	21.4%	19.7%
Estimated Nights	33,600,100	39,601,500	17.9%	15.3%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
Germany Sample Size: 257, CI Visitors +/- 14.7%, CI Nights +/- 19.5%.

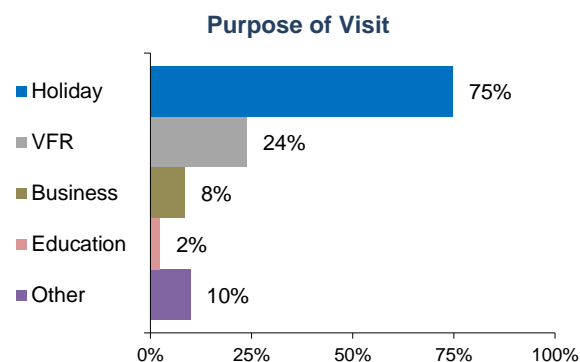
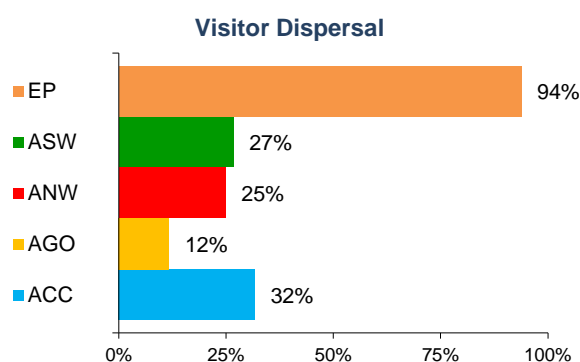
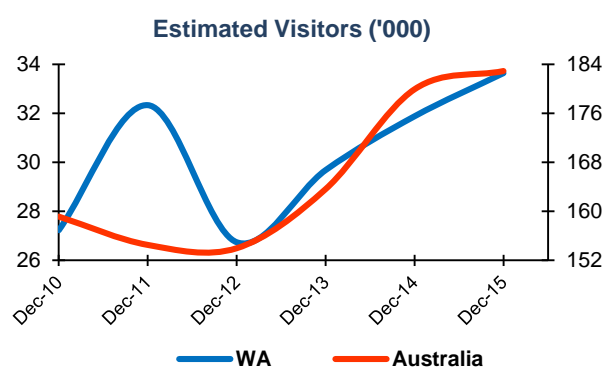
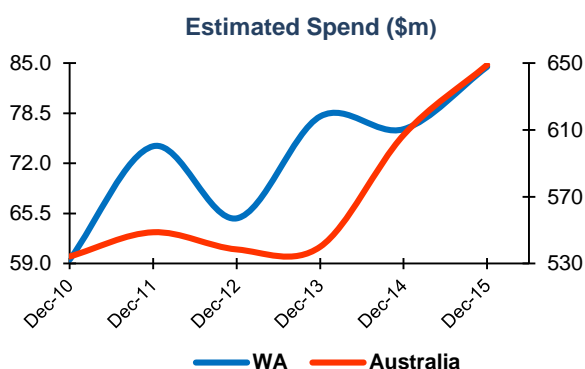
▲ AAGR = Average Annual Growth Rate



# Germany

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$76	\$85	10.6%	4.0%
Estimated Visitors	31,900	33,600	5.3%	6.4%
Estimated Nights	1,168,500	1,163,400	-0.4%	-4.3%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$607	\$649	6.9%	9.6%
Estimated Visitors	179,900	182,900	1.7%	5.7%
Estimated Nights	8,938,400	9,156,500	2.4%	4.7%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Germany Sample Size: 235, CI Visitors +/- 16.7%, CI Nights +/- 25.2%.

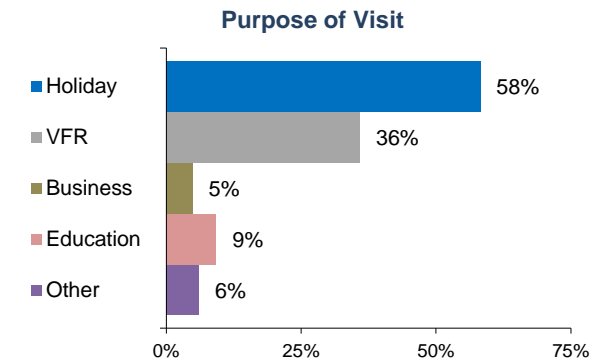
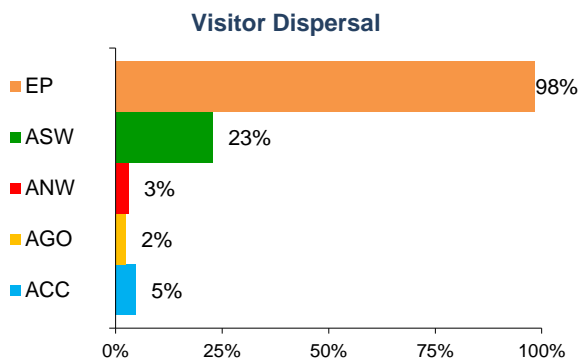
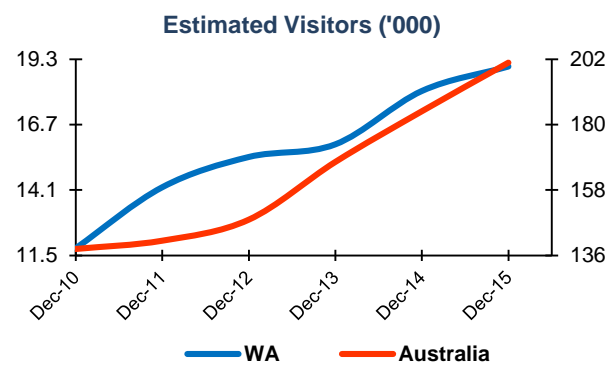
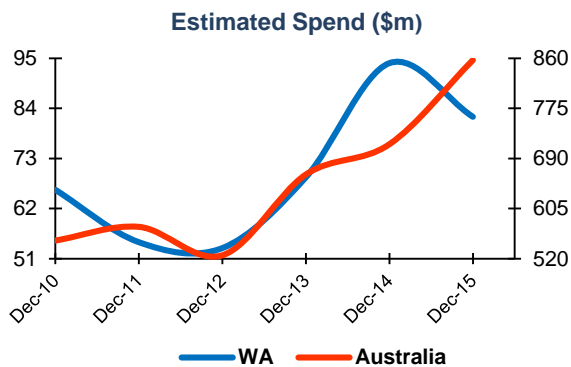
▲ AAGR = Average Annual Growth Rate



# Hong Kong

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$94	\$82	-12.5%	9.2%
Estimated Visitors	18,000	19,000	5.6%	9.3%
Estimated Nights	1,073,800	1,061,100	-1.2%	7.9%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$714	\$857	20.0%	13.7%
Estimated Visitors	184,500	200,800	8.8%	9.5%
Estimated Nights	7,537,700	8,012,300	6.3%	13.1%



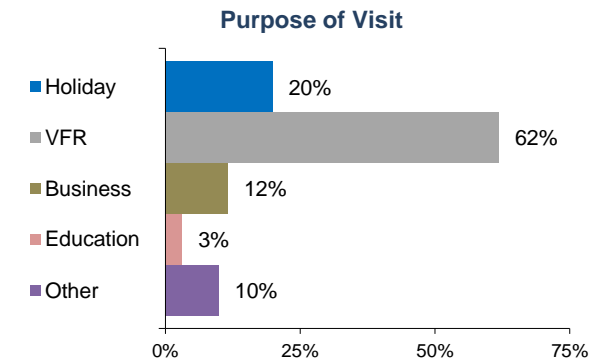
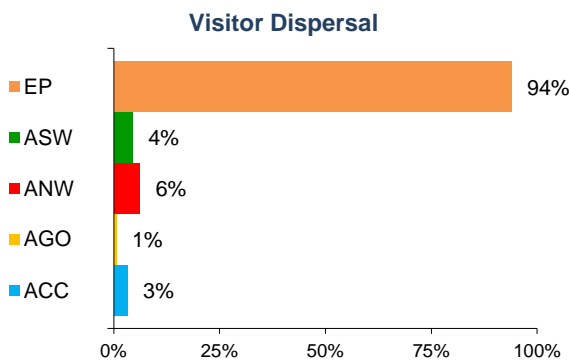
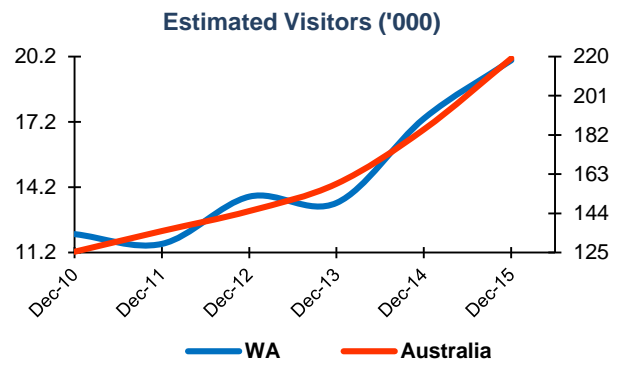
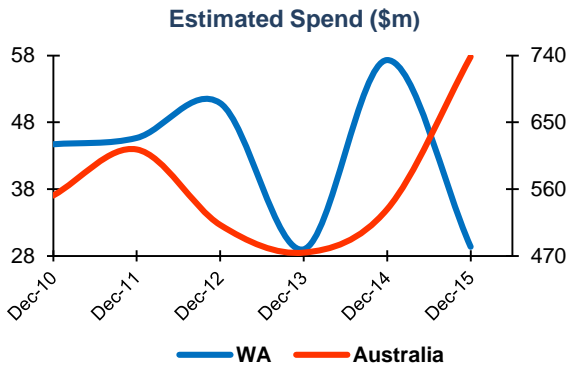
Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Hong Kong Sample Size: 123, CI Visitors +/- 21.9%, CI Nights +/- 26.2%.

▲ AAGR = Average Annual Growth Rate



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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$57	\$29	-48.8%	0.7%
Estimated Visitors	17,400	20,000	14.9%	21.7%
Estimated Nights	1,004,200	1,243,100	23.8%	43.1%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$533	\$738	38.6%	24.7%
Estimated Visitors	184,700	219,000	18.6%	17.6%
Estimated Nights	10,272,400	14,170,400	37.9%	22.0%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 India Sample Size: 143, CI Visitors +/- 21.4%, CI Nights +/- 24.4%.

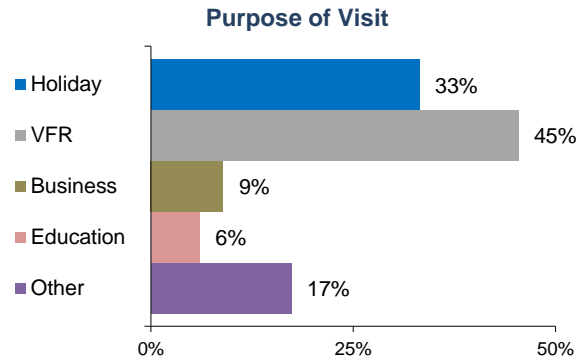
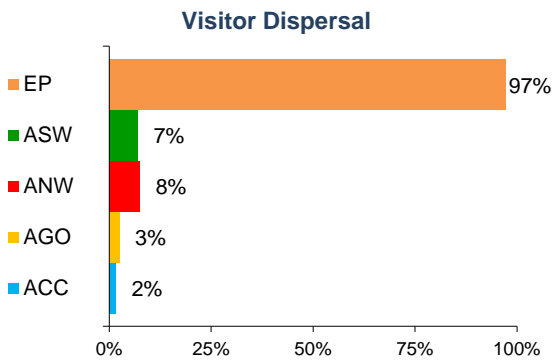
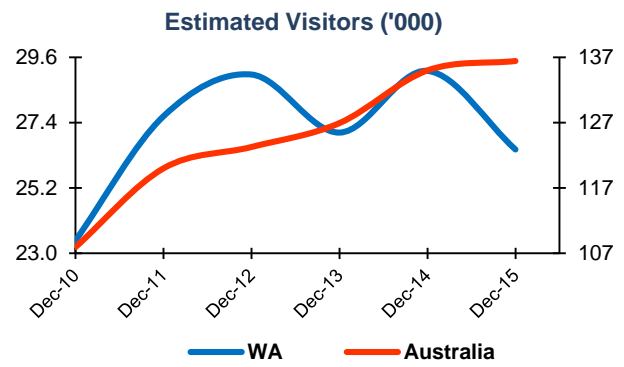
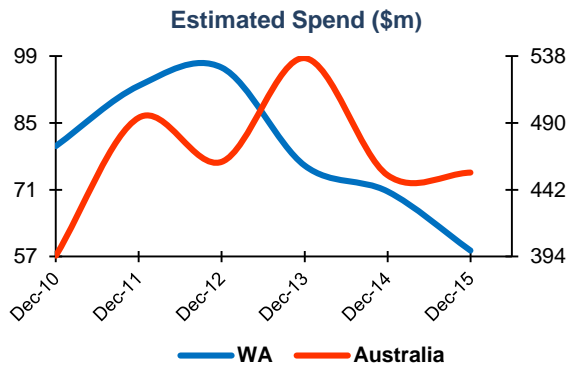
▲ AAGR = Average Annual Growth Rate



# Indonesia

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$71	\$58	-17.6%	-12.5%
Estimated Visitors	29,100	26,500	-8.9%	-1.1%
Estimated Nights	750,400	726,300	-3.2%	14.3%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$452	\$454	0.4%	-8.0%
Estimated Visitors	135,000	136,400	1.0%	3.7%
Estimated Nights	4,457,900	4,320,100	-3.1%	3.9%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Indonesia Sample Size: 232, CI Visitors +/- 18.7%, CI Nights +/-31.1%.

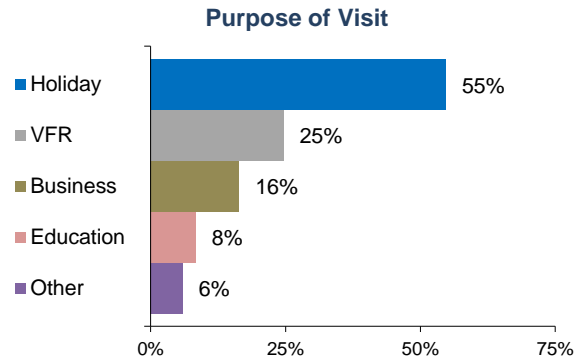
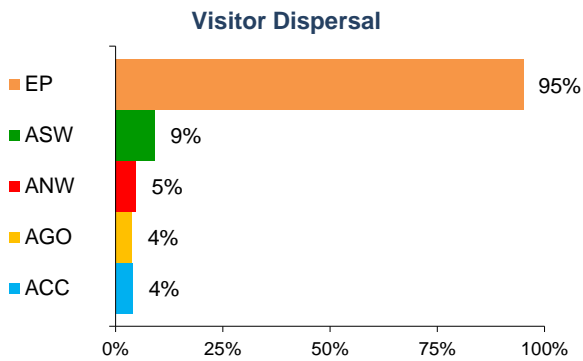
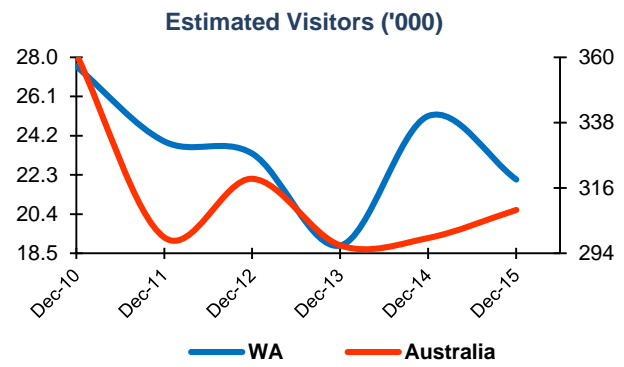
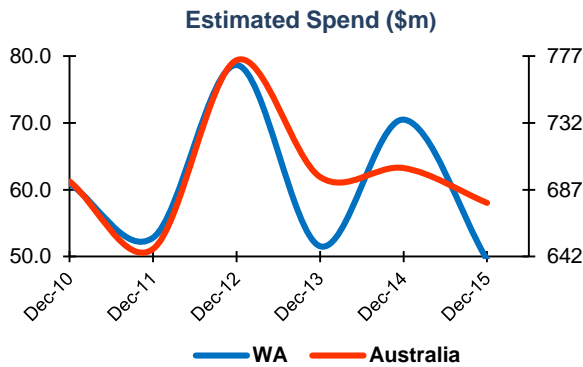
▲ AAGR = Average Annual Growth Rate



Japan

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$71	\$50	-29.8%	-2.0%
Estimated Visitors	25,200	22,100	-12.3%	8.1%
Estimated Nights	928,100	594,400	-36.0%	0.0%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$702	\$678	-3.3%	-1.3%
Estimated Visitors	299,200	308,600	3.1%	2.0%
Estimated Nights	8,521,900	8,313,400	-2.4%	-3.7%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Japan Sample Size: 132, CI Visitors +/- 20.4%, CI Nights +/- 34.0%.

▲ AAGR = Average Annual Growth Rate

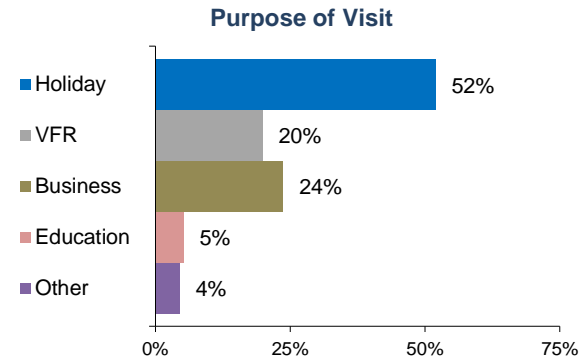
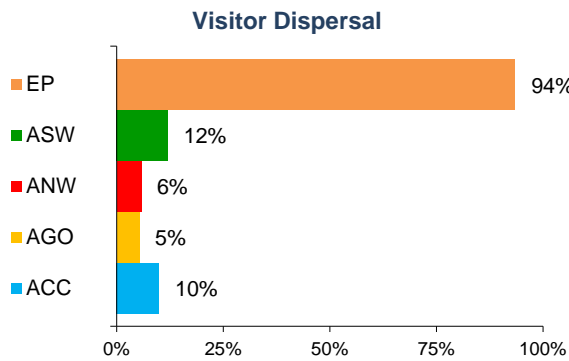
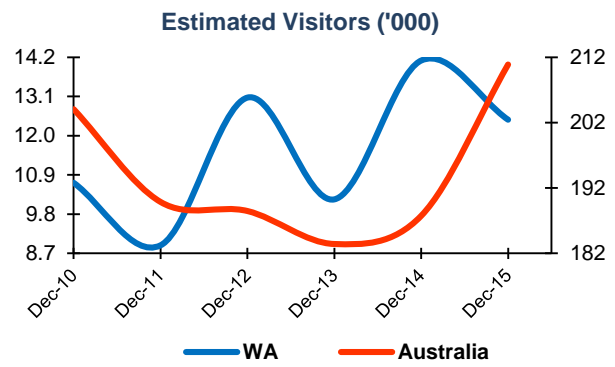
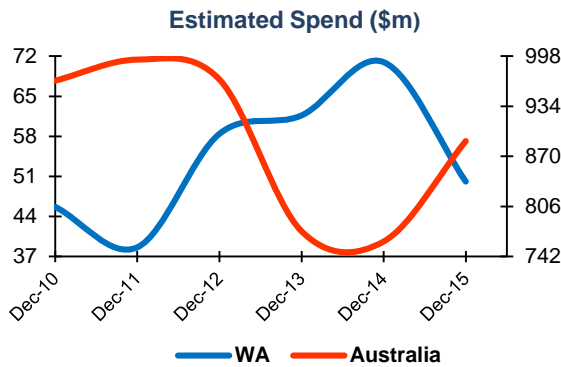




Korea

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$71	\$50	-29.4%	-9.9%
Estimated Visitors	14,100	12,500	-11.3%	10.7%
Estimated Nights	1,265,700	744,900	-41.1%	-14.6%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$761	\$890	16.8%	7.2%
Estimated Visitors	187,800	210,900	12.3%	7.2%
Estimated Nights	10,392,900	11,595,300	11.6%	4.6%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Korea Sample Size: 100, CI Visitors +/- 26.8%, CI Nights +/- 30.7%

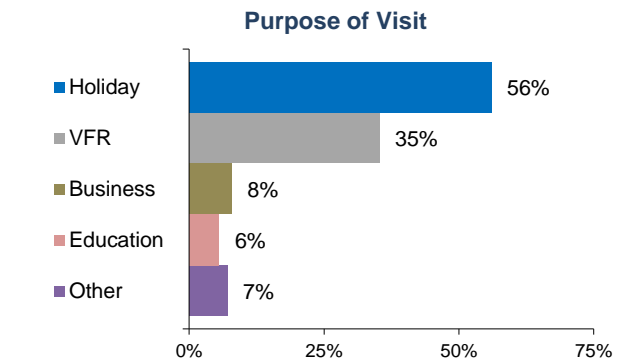
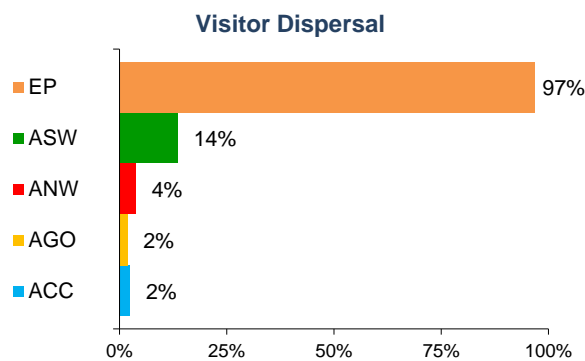
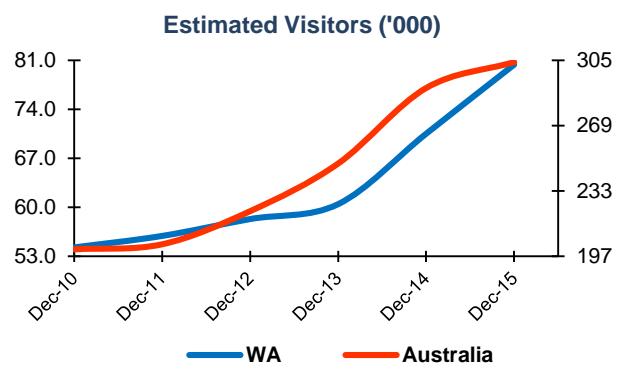
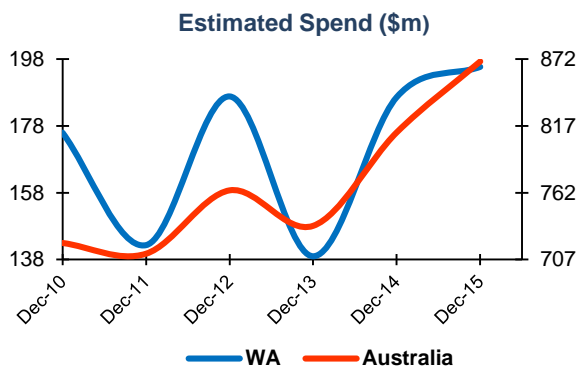
▲ AAGR = Average Annual Growth Rate



# Malaysia

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$187	\$196	4.9%	18.6%
Estimated Visitors	70,500	80,400	14.0%	15.4%
Estimated Nights	1,296,300	1,560,000	20.3%	16.2%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$812	\$870	7.2%	8.8%
Estimated Visitors	289,700	304,000	4.9%	10.7%
Estimated Nights	6,779,400	7,462,400	10.1%	10.2%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Malaysia Sample Size: 511, CI Visitors +/- 11.0%, CI Nights +/- 22.0%.

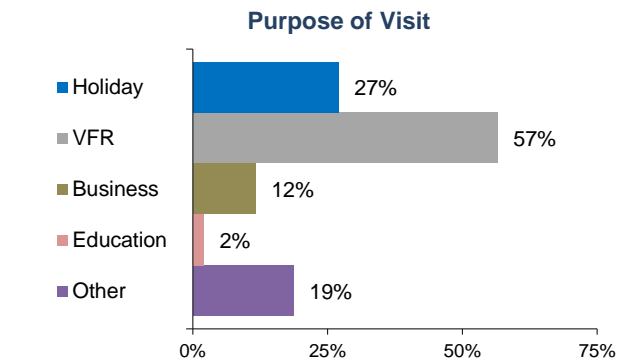
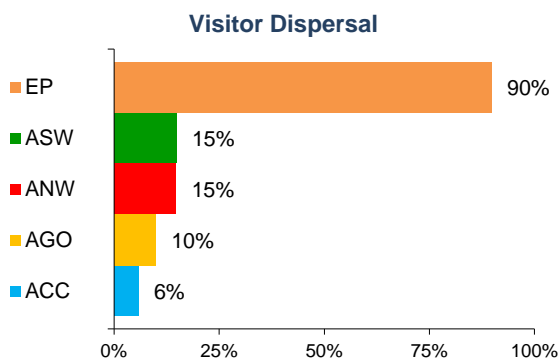
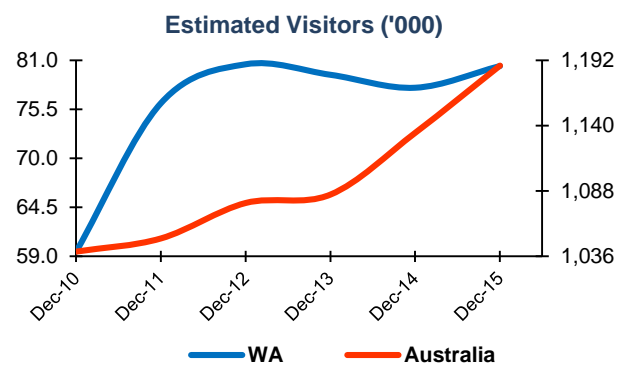
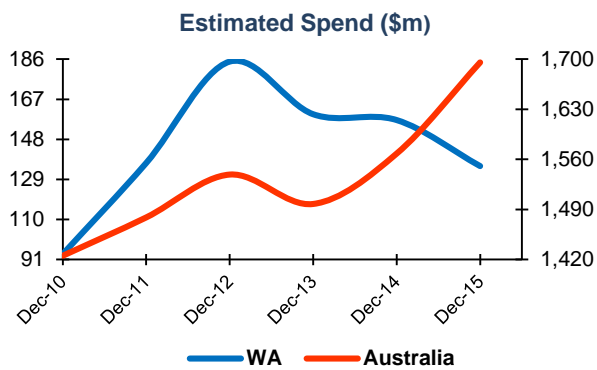
▲ AAGR = Average Annual Growth Rate



# New Zealand

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$157	\$135	-13.9%	-8.0%
Estimated Visitors	77,900	80,300	3.1%	0.6%
Estimated Nights	2,120,500	1,873,800	-11.6%	-11.1%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$1,568	\$1,696	8.1%	6.4%
Estimated Visitors	1,134,200	1,187,600	4.7%	4.6%
Estimated Nights	14,967,300	16,004,600	6.9%	2.8%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 NZ Sample Size: 413, CI Visitors +/- 11.0%, CI Nights +/- 20.3%.

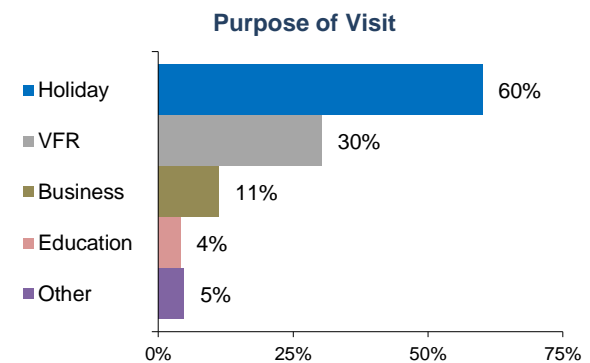
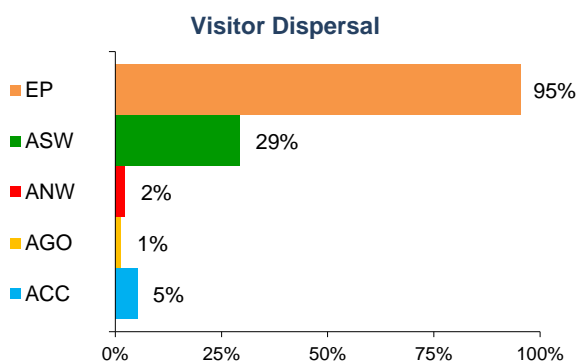
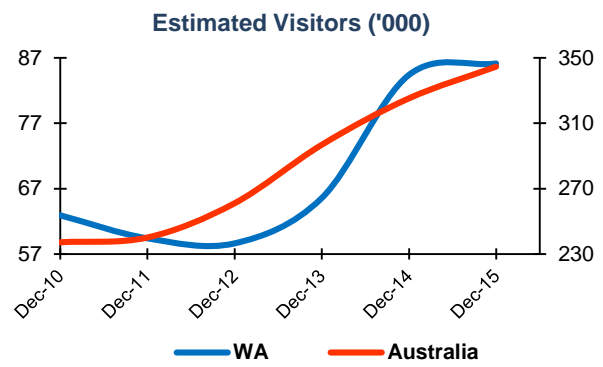
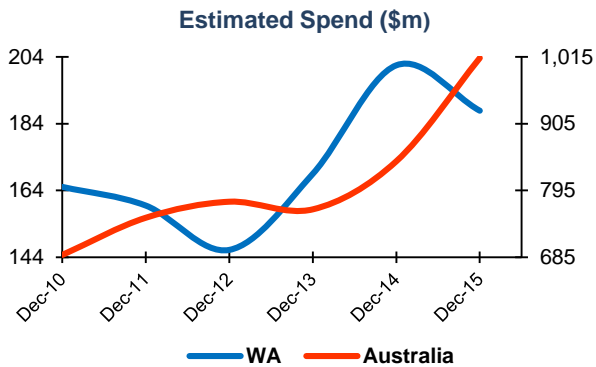
▲ AAGR = Average Annual Growth Rate



# Singapore

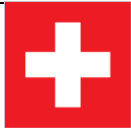
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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$201	\$188	-6.7%	5.4%
Estimated Visitors	84,400	86,100	2.0%	14.7%
Estimated Nights	1,050,800	1,113,000	5.9%	11.2%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$843	\$1,013	20.2%	15.2%
Estimated Visitors	325,200	344,700	6.0%	7.8%
Estimated Nights	5,119,800	6,255,900	22.2%	11.6%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Singapore Sample Size: 616, CI Visitors +/- 10.6%, CI Nights +/- 25.7%.

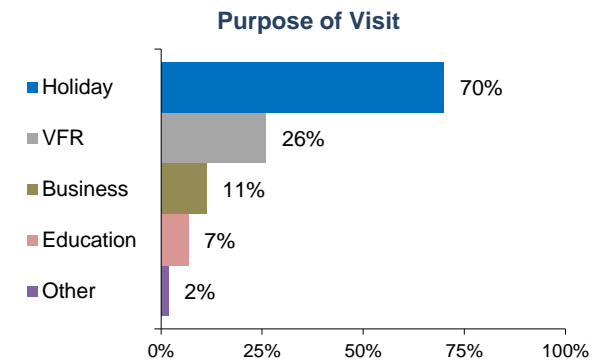
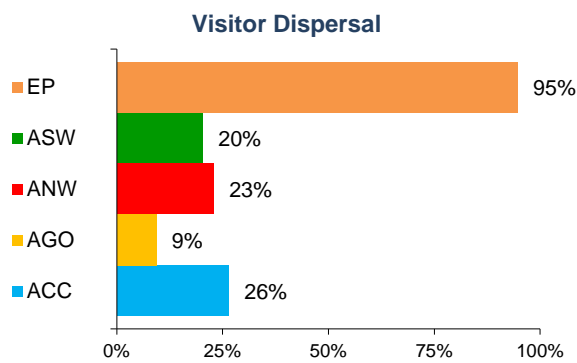
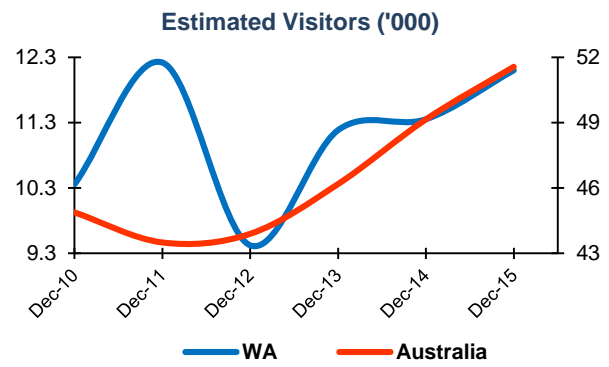
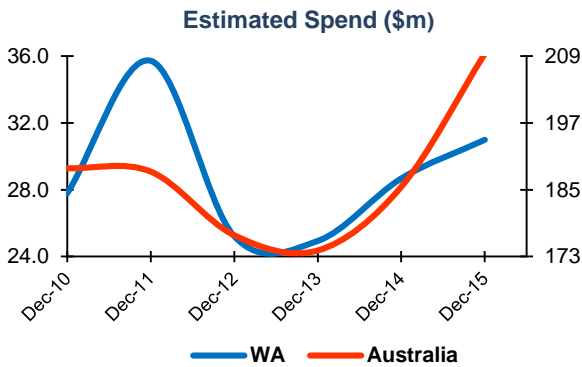
▲ AAGR = Average Annual Growth Rate



# Switzerland

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$29	\$31	8.1%	11.5%
Estimated Visitors	11,400	12,100	6.1%	3.9%
Estimated Nights	271,600	273,000	0.5%	8.0%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$186	\$209	12.9%	9.7%
Estimated Visitors	49,100	51,600	5.1%	5.7%
Estimated Nights	1,709,200	1,807,200	5.7%	6.4%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 Switzerland Sample Size: 131, CI Visitors +/- 27.2%, CI Nights +/- 48.2%.

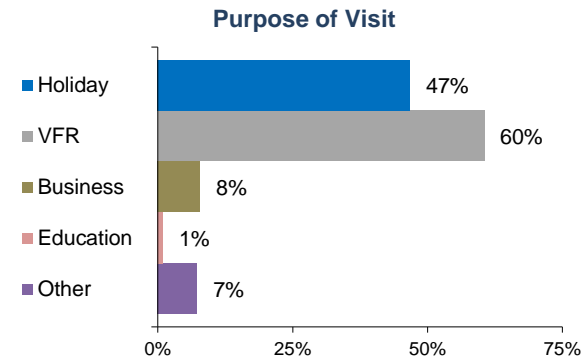
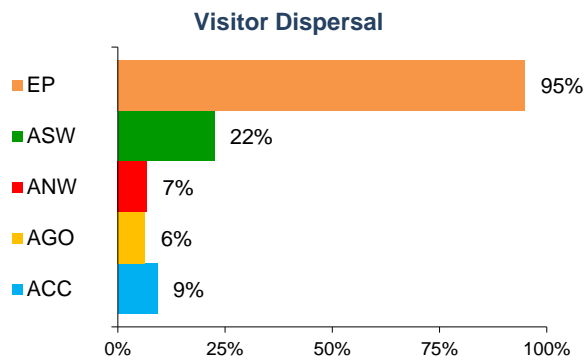
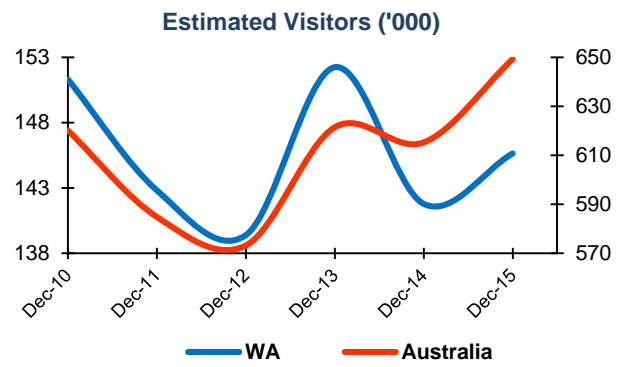
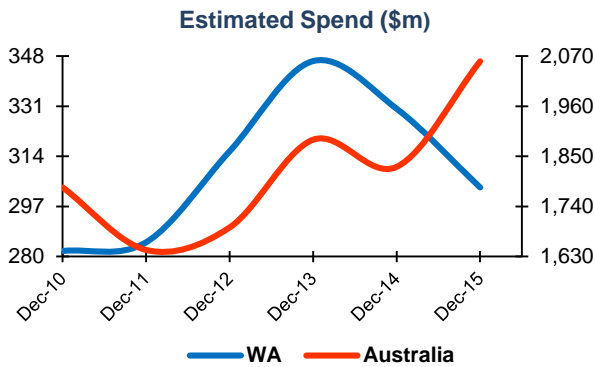
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# United Kingdom

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$330	\$303	-8.1%	-6.4%
Estimated Visitors	141,800	145,600	2.7%	-2.2%
Estimated Nights	4,620,400	4,315,500	-6.6%	-4.9%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$1,827	\$2,059	12.7%	4.5%
Estimated Visitors	615,200	649,200	5.5%	2.2%
Estimated Nights	25,073,700	26,642,700	6.3%	1.1%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 UK Sample Size: 1,063, CI Visitors +/- 8.3%, CI Nights +/- 14.0%.

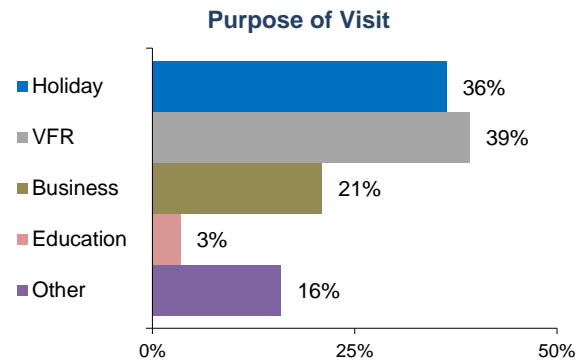
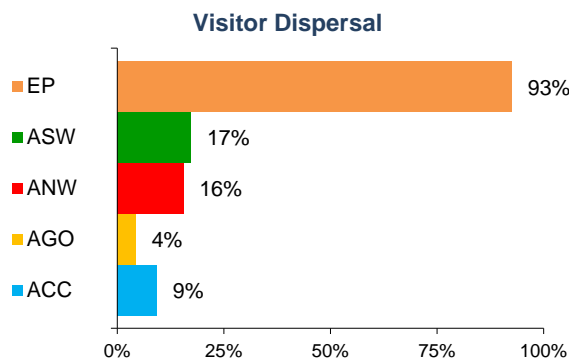
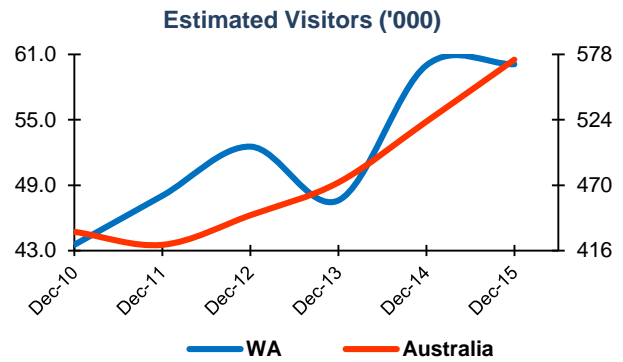
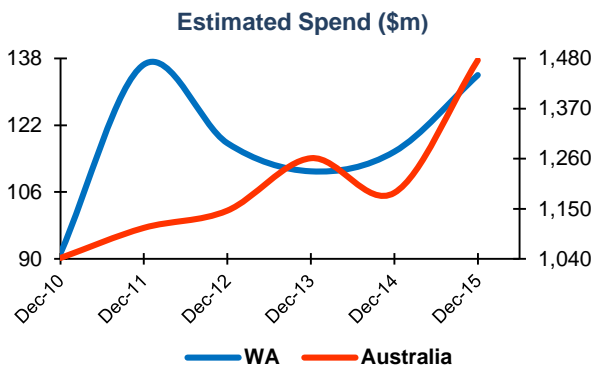
▲ AAGR = Average Annual Growth Rate



USA

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	YE Dec-14	YE Dec-15	% Change YE Dec-14 – YE Dec-15	3 Year AAGR <sup>▲</sup>
<b>Western Australia</b>				
Estimated Spend (\$ Mil)	\$116	\$134	15.9%	9.9%
Estimated Visitors	60,000	60,100	0.2%	12.4%
Estimated Nights	1,357,400	1,478,500	8.9%	7.1%
<b>Australia</b>				
Estimated Spend (\$ Mil)	\$1,185	\$1,476	24.6%	8.2%
Estimated Visitors	522,500	573,700	9.8%	10.2%
Estimated Nights	11,680,100	13,458,100	15.2%	6.6%



Source: Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).  
 Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.  
 USA Sample Size: 338, CI Visitors +/- 12.6%, CI Nights +/- 22.6%.

▲ AAGR = Average Annual Growth Rate

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## Source and Definitions

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### Source:

#### Tourism Research Australia

- Tourism Research Australia is a branch within the Tourism Division of Austrade providing research information that supports improved decision making, marketing and tourism industry performance for the Australian community.
  - International Overnight Visitor Survey (IVS): The International Visitor Survey samples 40,000 departing, short-term international travellers over the age of 15 years who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports; Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.
  - Regional Expenditure Estimates: Regional Expenditure uses a model based approach to allocate international and domestic visitor expenditure to Australian tourism regions.

### Definitions:

- Average Annual Growth Rate (AAGR):
  - Calculation of the average annual percentage increase / decrease over a specified period of years.
- Overnight International Visitors Definition:
  - International visitors aged 15 years and over who spent at least one night in the region.