



Tourism Western Australia

Fast Facts Year Ending December 2015

Prepared by the Research Team

March 2016



PLEASE NOTE

Changes to National Visitor Survey Methodology

Tourism Research Australia's (TRA) National Visitor Survey (NVS) commenced in 1998. Between 1998 and 2013, all interviews were undertaken with respondents on residential fixed-line telephones using Computer Assisted Telephone Interviewing (CATI).

The mobile phone only population in Australia has increased substantially in recent years, particularly for younger age groups. Latest estimates indicate that 30% of those aged 15-24 years and 47% of those aged 25-34 years are mobile only.

Given this, to provide better coverage of the Australian population, TRA introduced mobile phone interviewing as of 2 January 2014. As of 2014, 50% of the NVS sample is interviewed on fixed-lines, and 50% on mobile phones, also known as a 'dual-frame sample' methodology. Therefore, in this publication, Year Ending (YE) June 2014 NVS data is based on two quarters of fixed-line only sample (July – December 2013) and two-quarters of dual frame sample (January to June 2014), while YE June 2015 NVS data is completely based on dual frame sample.

Analysis by TRA has revealed that people interviewed on mobile phones are different to people interviewed on landlines in terms of their demographic profile and travel behaviour. Most notably, people interviewed on mobile phones are more likely to be younger and to take more trips. The inclusion of mobile phone interviewing has improved visitation estimates by bringing the sample more in line with the Australian population. However, the change in methodology means that domestic estimates from the March quarter of 2014 and onwards are not directly comparable to domestic estimates from previous quarters. Therefore, **domestic estimates for 2014 onwards are not directly comparable to domestic estimates previous years**. It is important to keep this change in methodology in mind when looking at long term trends in the NVS results.

Confidence Intervals and Sample Sizes

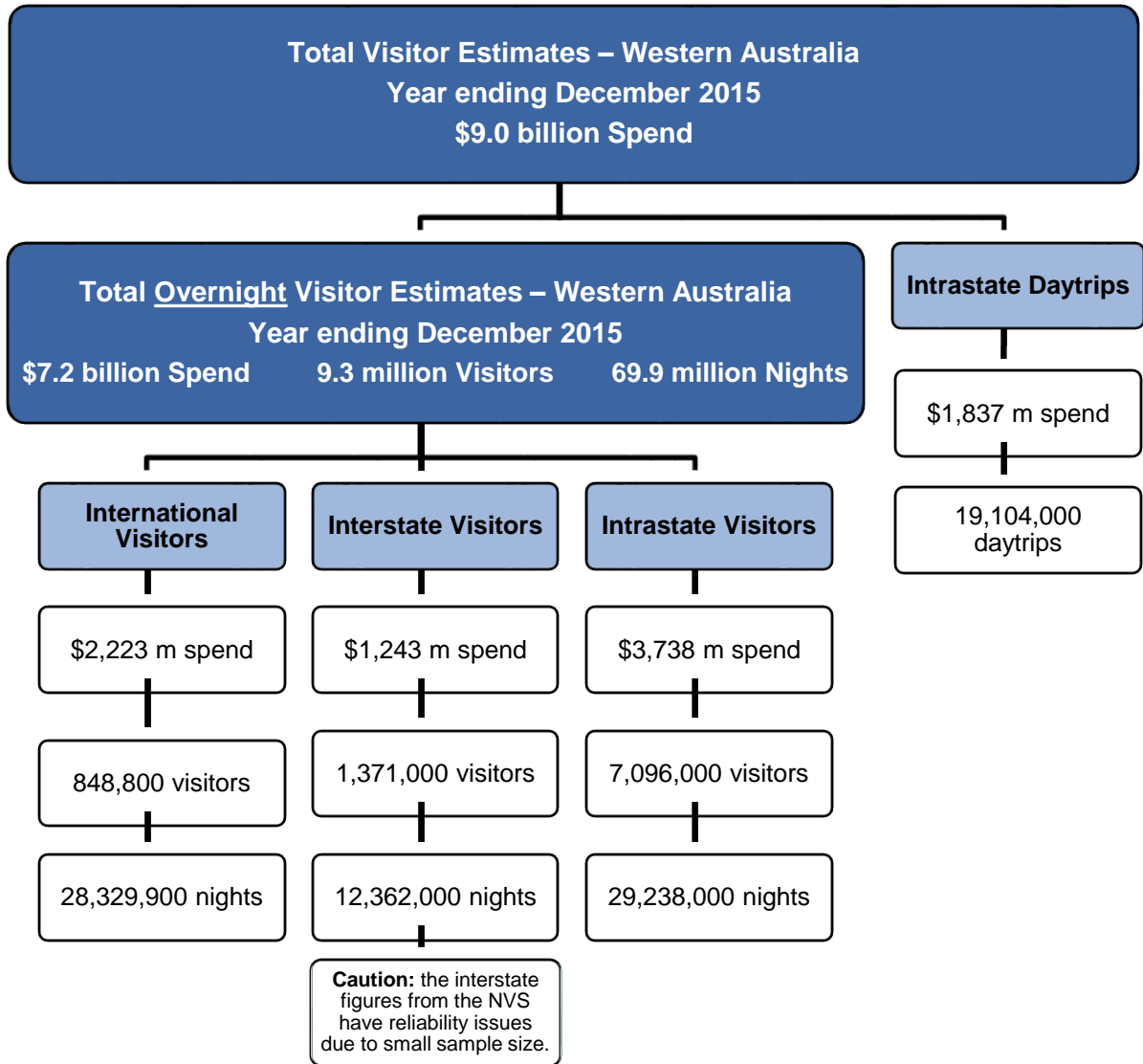
Note that estimates in this document are based on survey data and need to be considered within these Confidence Intervals (CI) for Western Australia YE December 2015 estimates:

- Intrastate CI: Spend \pm 5.0%, Visitors \pm 4.1%, Nights \pm 6.1%
- Interstate CI: Spend \pm 5.0%, Visitors \pm 9.3%, Nights \pm 9.3%
- International CI: Spend \pm 6.3%, Visitors \pm 3.6%, Nights \pm 6.0%
- Intrastate Daytrip CI: Spend \pm 7.0%, Visitors \pm 4.4%

Sample Sizes for Western Australia the YE December 2015 estimates are outlined below:

- Intrastate Visitors: n= 3,259
- Interstate Visitors: n= 612
- Domestic Spend: n= 3,574
- International: Spend n= 5,096, Visitors n= 5,886
- Intrastate Daytrip: Spend n= 2,286, Visitors n= 2,284

Total Visitors to/within Western Australia Market Overview



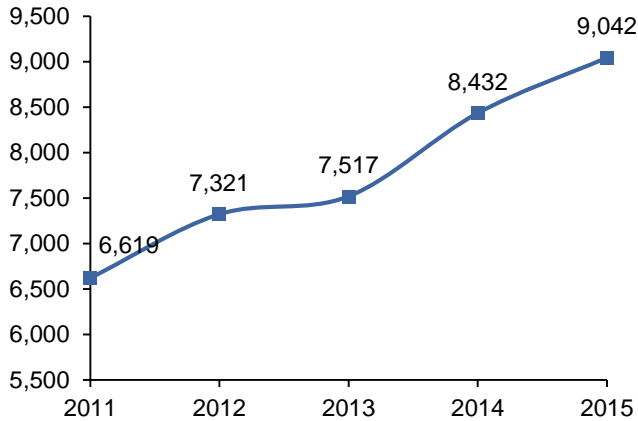
Total Visitors to/within Western Australia Market Overview

Spend

(+) 7.2%

- \$9,042 million in spend
- \$129 average spend per day
- 10.4% of visitor spend in Australia

Estimated Spend (\$m)

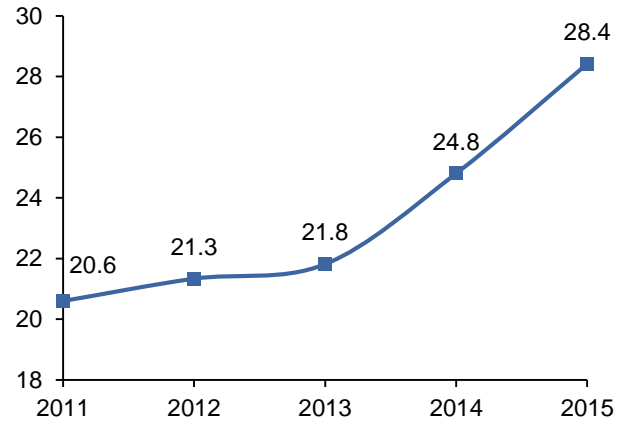


Visitors

(+) 14.6%

- 28.4 million visitors (including both overnight visitors and daytrips)
- 10.7% of visitors to/within Australia

Estimated Visitors (Million)

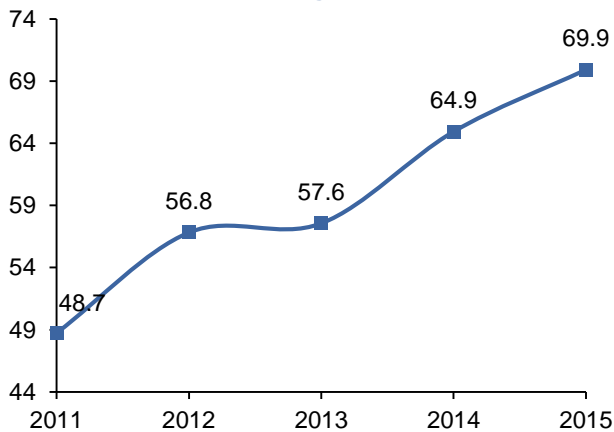


Visitor Nights

(+) 7.7%

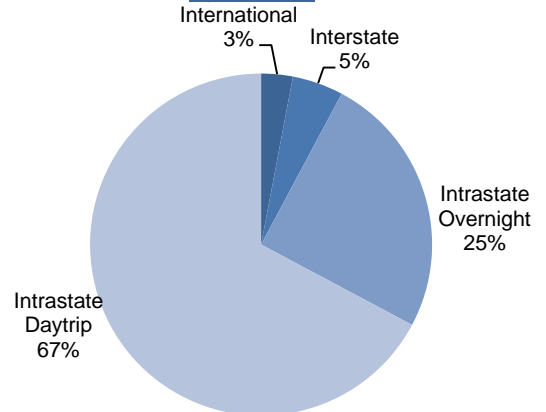
- 69.9 million nights
- 7.5 nights on average (based on overnight visitors only)
- 12.3% of visitor nights in Australia

Estimated Nights (Million)

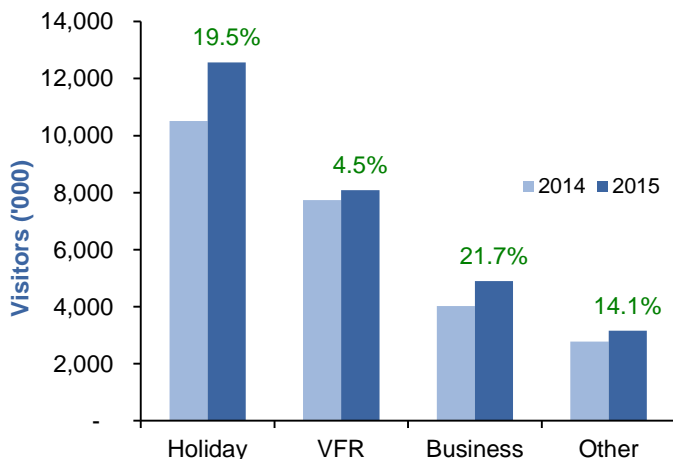


Source Markets

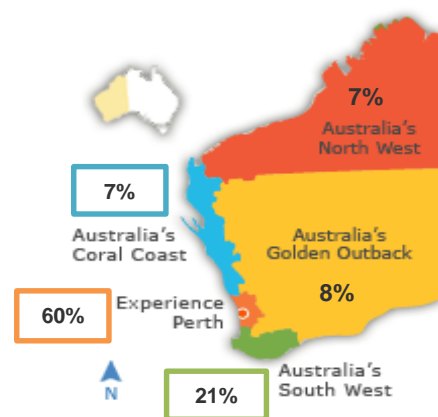
By Visitors



Purpose of Visit



Visitor Dispersal



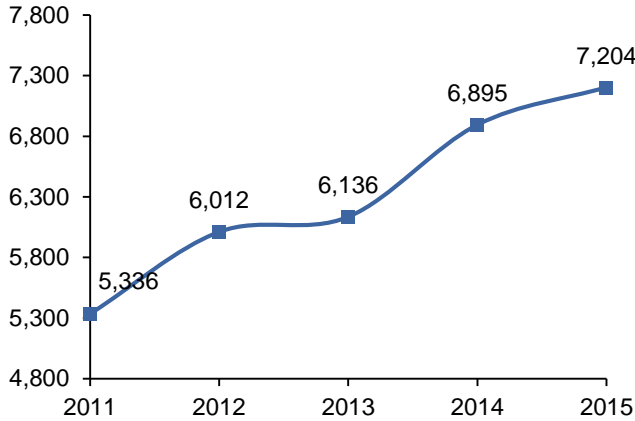
Overnight Visitors to Western Australia Market Overview

Spend

(+) 4.5%

- \$7,204 million in spend
- Average spend per visitor: \$773
- Average spend per night: \$103
- 10.4% of overnight visitor spend in Australia

Estimated Spend (\$m)

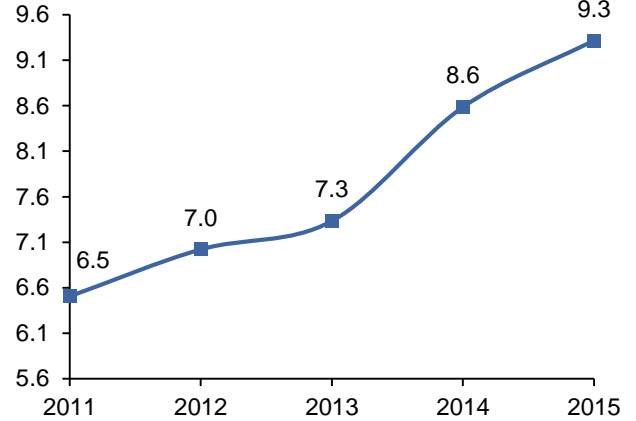


Visitors

(+) 8.5%

- 9.3 million visitors
- 9.8% of overnight visitors in Australia

Estimated Visitors (Million)

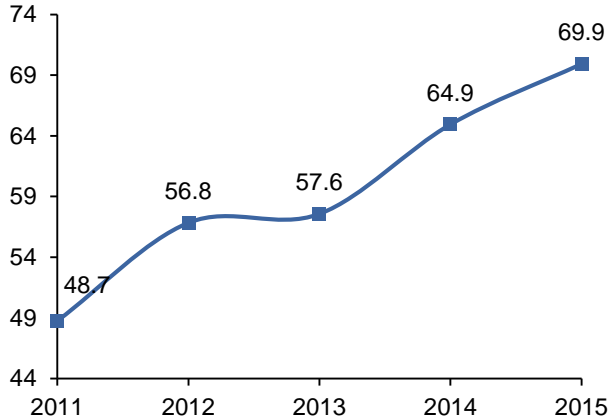


Visitor Nights

(+) 7.7%

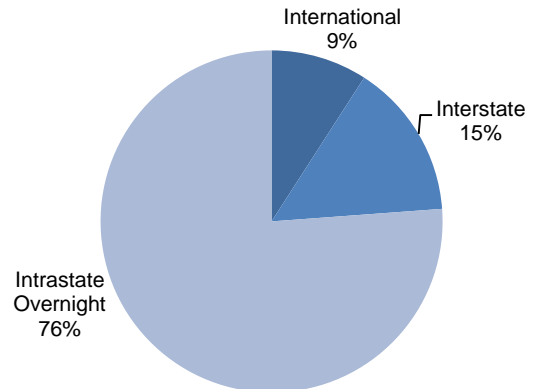
- 69.9 million nights
- 7.5 nights on average
- 12.3% of visitor nights in Australia

Estimated Nights (Million)

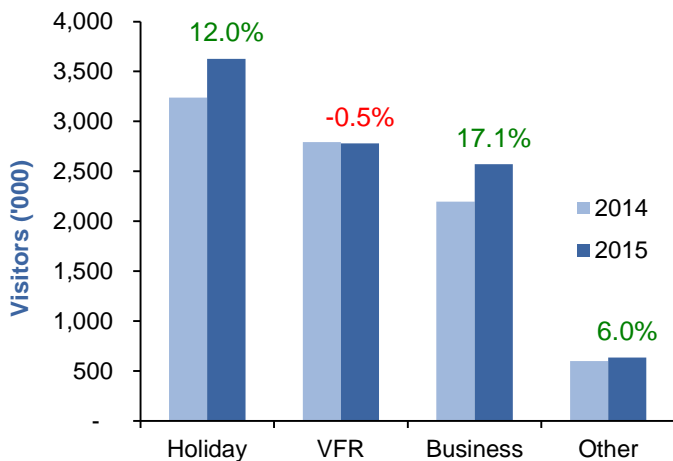


Source Markets

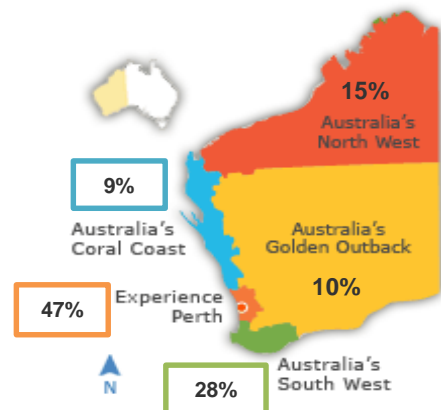
By Visitors



Purpose of Visit



Visitor Dispersal



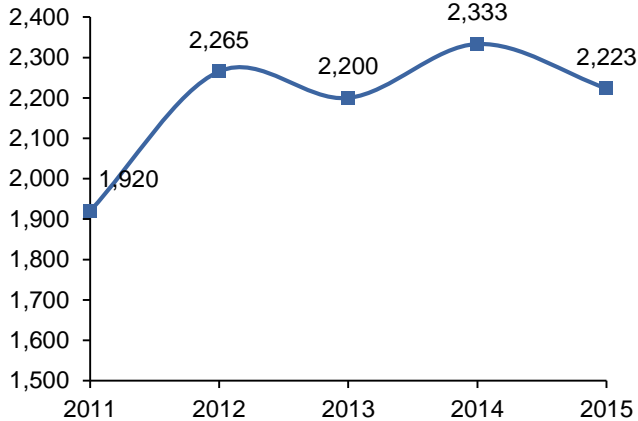
International Visitors to Western Australia Market Overview

Spend

(-) 4.7%

- \$2,223 million in spend
- Average spend per night: \$78
- 9.7% of international spend in Australia

Estimated Spend (\$m)

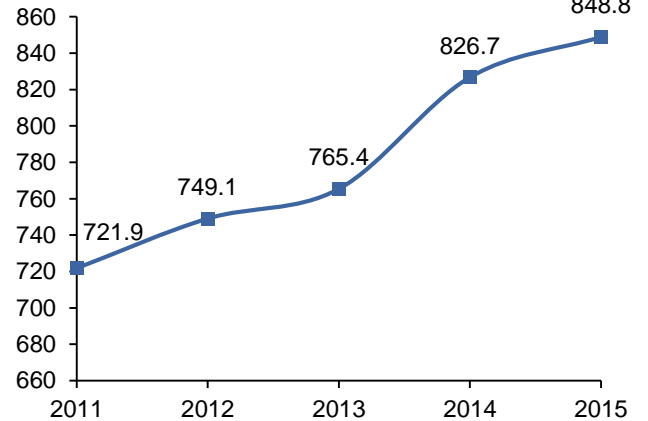


Visitors

(+) 2.7%

- 848,800 visitors
- 12.4% of international visitors to Australia

Estimated Visitors ('000)

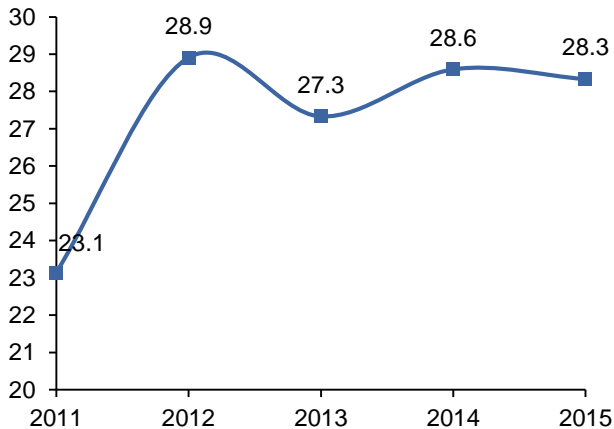


Visitor Nights

(-) 0.9%

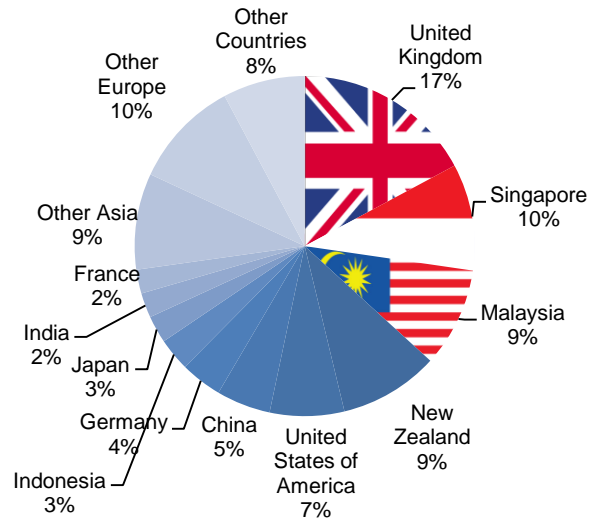
- 28.3 million nights
- 33.4 nights on average
- 11.4% of international visitor nights in Australia

Estimated Nights (Million)

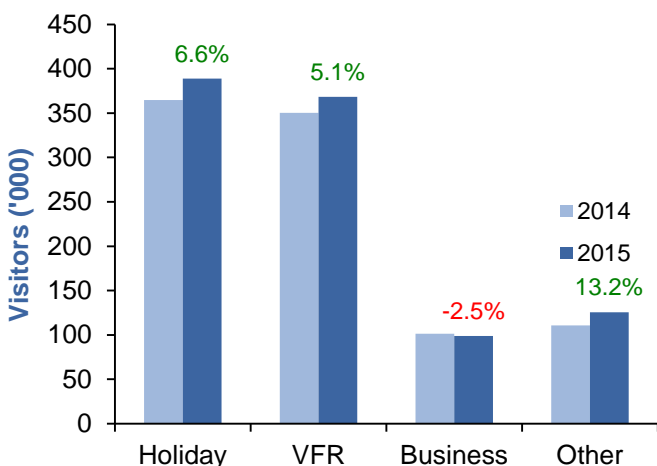


Source Markets

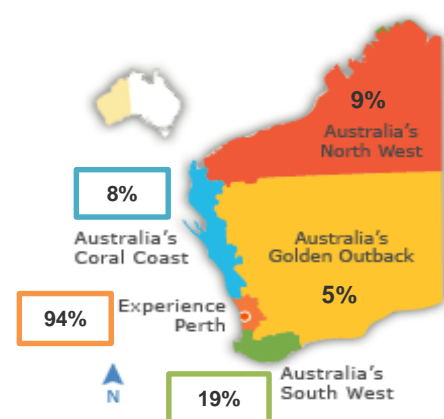
By Visitors



Purpose of Visit



Visitor Dispersal



International Visitors to Western Australia Market Overview Cont.

VISITOR SPEND FROM THE TOP 20 INTERNATIONAL MARKETS TO WESTERN AUSTRALIA (RANKED BY SPEND - \$ MILLIONS)

Western Australia						Australia				
Country of Residence	Rank	YE Dec-14	YE Dec-15	% Change	3 Year AAGR	Rank	YE Dec-14	YE Dec-15	% Change	3 Year AAGR
UK	1	330	303	-8.1%	-6.4%	2	1,827	2,059	12.7%	4.5%
China	2	185	231	25.0%	18.3%	1	3,835	5,625	46.6%	30.6%
Malaysia	3	187	196	4.9%	18.6%	7	812	870	7.2%	8.8%
Singapore	4	201	188	-6.7%	5.4%	5	843	1,013	20.2%	15.2%
NZ	5	157	135	-13.9%	-8.0%	3	1,568	1,696	8.1%	6.4%
USA	6	116	134	15.9%	9.9%	4	1,185	1,476	24.6%	8.2%
Germany	7	76	85	10.6%	4.0%	11	607	649	6.9%	9.6%
Hong Kong	8	94	82	-12.5%	9.2%	8	714	857	20.0%	13.7%
France	9	53	76	42.6%	-2.2%	13	418	512	22.6%	6.2%
Ireland	10	89	66	-25.9%	-24.6%	21	281	226	-19.3%	-21.4%
Indonesia	11	71	58	-17.6%	-12.5%	15	452	454	0.4%	-8.0%
Taiwan	12	61	56	-8.6%	17.0%	12	493	545	10.6%	9.2%
South Africa	13	55	50	-8.7%	5.7%	24	149	147	-1.0%	-7.9%
Korea	14	71	50	-29.4%	-9.9%	6	761	890	16.8%	7.2%
Japan	15	71	50	-29.8%	-2.0%	10	702	678	-3.3%	-1.3%
Canada	16	33	46	37.4%	2.7%	14	427	485	13.7%	9.8%
Italy	17	39	42	6.6%	7.2%	18	310	289	-6.8%	-0.2%
Scandinavia	18	36	36	0.7%	-9.4%	16	354	358	0.9%	4.9%
Philippines	19	50	33	-33.4%	-7.7%	17	258	314	21.8%	9.9%
Switzerland	20	29	31	8.1%	11.5%	22	186	209	12.9%	9.7%

International Visitors to Western Australia Market Overview Cont.

VISITORS OF THE TOP 20 INTERNATIONAL MARKETS TO WESTERN AUSTRALIA (RANKED BY VISITORS)

Western Australia						Australia				
Country of Residence	Rank	YE Dec-14	YE Dec-15	% Change	3 Year AAGR	Rank	YE Dec-14	YE Dec-15	% Change	3 Year AAGR
UK	1	141,800	145,600	2.7%	-2.2%	3	615,200	649,200	5.5%	2.2%
Singapore	2	84,400	86,100	2.0%	14.7%	5	325,200	344,700	6.0%	7.8%
Malaysia	3	70,500	80,400	14.0%	15.4%	7	289,700	304,000	4.9%	10.7%
NZ	4	77,900	80,300	3.1%	0.6%	1	1,134,200	1,187,600	4.7%	4.6%
USA	5	60,000	60,100	0.2%	12.4%	4	522,500	573,700	9.8%	10.2%
China	6	38,800	43,700	12.6%	16.0%	2	784,300	952,400	21.4%	19.7%
Germany	7	31,900	33,600	5.3%	6.4%	11	179,900	182,900	1.7%	5.7%
Indonesia	8	29,100	26,500	-8.9%	-1.1%	12	135,000	136,400	1.0%	3.7%
Japan	9	25,200	22,100	-12.3%	8.1%	6	299,200	308,600	3.1%	2.0%
India	10	17,400	20,000	14.9%	21.7%	8	184,700	219,000	18.6%	17.6%
France	11	20,100	19,300	-4.0%	-2.5%	15	112,800	113,700	0.8%	4.2%
Hong Kong	12	18,000	19,000	5.6%	9.3%	10	184,500	200,800	8.8%	9.5%
Ireland	13	20,100	18,800	-6.5%	-4.2%	20	58,800	54,500	-7.3%	-5.0%
South Africa	14	19,100	18,700	-2.1%	4.0%	22	50,400	53,100	5.4%	2.4%
Canada	15	16,600	17,900	7.8%	2.6%	13	129,600	134,100	3.5%	4.9%
Scandinavia	16	13,000	15,600	20.0%	7.9%	16	94,900	96,300	1.5%	2.9%
Korea	17	14,100	12,500	-11.3%	10.7%	9	187,800	210,900	12.3%	7.2%
Italy	18	13,400	12,100	-9.7%	4.4%	19	71,100	70,000	-1.5%	1.3%
Switzerland	18	11,400	12,100	6.1%	3.9%	23	49,100	51,600	5.1%	5.7%
Taiwan	20	11,800	10,600	-10.2%	-7.5%	14	112,400	122,000	8.5%	9.3%



International Visitors to Western Australia Market Overview Cont.

Market Share - Spend Estimates

(Ranked by overall spend estimates, YE December 2015)

Rank	Country of Residence	YE Dec-13	YE Dec-14	YE Dec-15
1	UK	18.4%	18.1%	14.7%
2	China	5.0%	4.8%	4.1%
3	Malaysia	18.9%	23.0%	22.5%
4	Singapore	22.1%	23.9%	18.5%
5	NZ	10.7%	10.0%	8.0%
6	USA	8.8%	9.8%	9.1%
7	Germany	14.5%	12.6%	13.0%
8	Hong Kong	10.4%	13.2%	9.6%
9	France	17.5%	12.8%	14.8%
10	Ireland	31.5%	31.6%	29.0%

Market Share - Visitor Estimates

(Ranked by overall visitor estimates, YE December 2015)

Rank	Country of Residence	YE Dec-13	YE Dec-14	YE Dec-15
1	UK	24.5%	23.0%	22.4%
2	Singapore	22.1%	26.0%	25.0%
3	Malaysia	24.3%	24.3%	26.4%
4	NZ	7.3%	6.9%	6.8%
5	USA	10.1%	11.5%	10.5%
6	China	4.9%	4.9%	4.6%
7	Germany	18.2%	17.7%	18.4%
8	Indonesia	21.4%	21.6%	19.4%
9	Japan	6.4%	8.4%	7.2%
10	India	8.5%	9.4%	9.1%

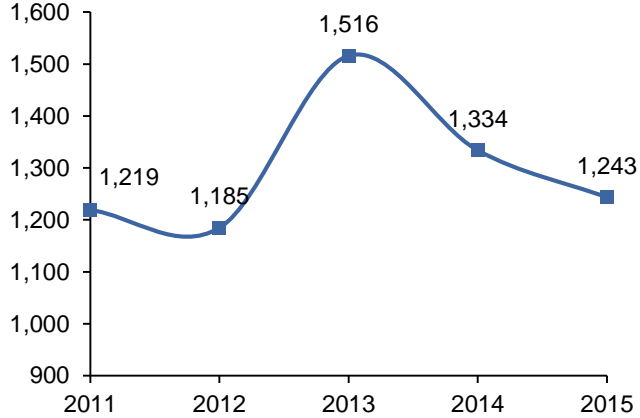
Interstate Visitors to Western Australia Market Overview*

Spend

(-) 6.8%

- \$1,243 million in spend
- \$101 average spend per night
- 5.6% of interstate spend in Australia

Estimated Spend (\$m)

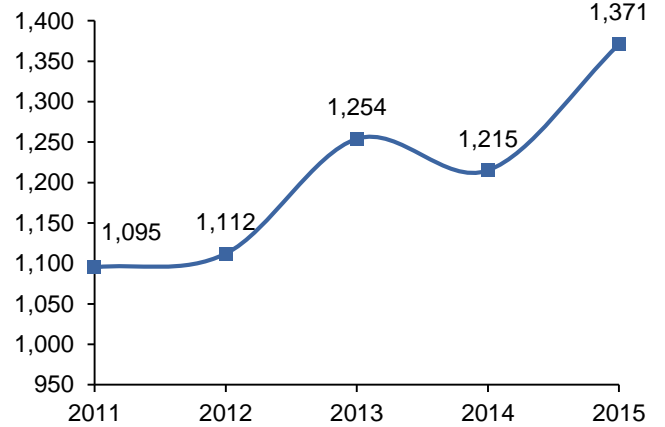


Visitors

(+) 12.8%

- 1.371 million visitors
- 4.8% of interstate visitors in Australia

Estimated Visitors ('000)

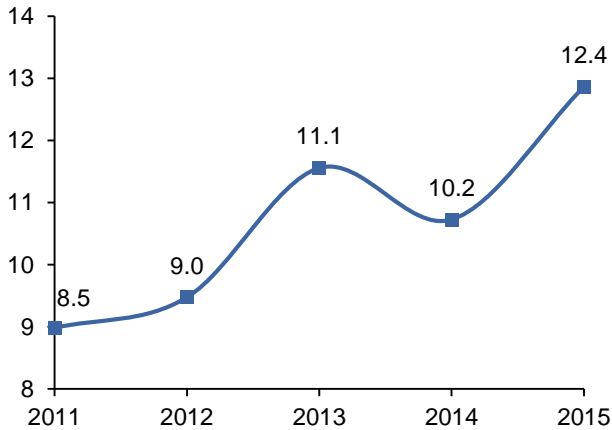


Visitor Nights

(+) 20.9%

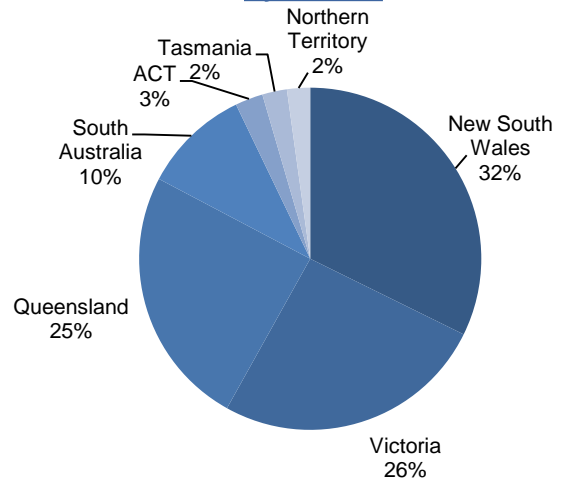
- 12.4 million nights
- 9.0 nights on average
- 8.8% of interstate visitor nights in Australia

Estimated Nights (Million)

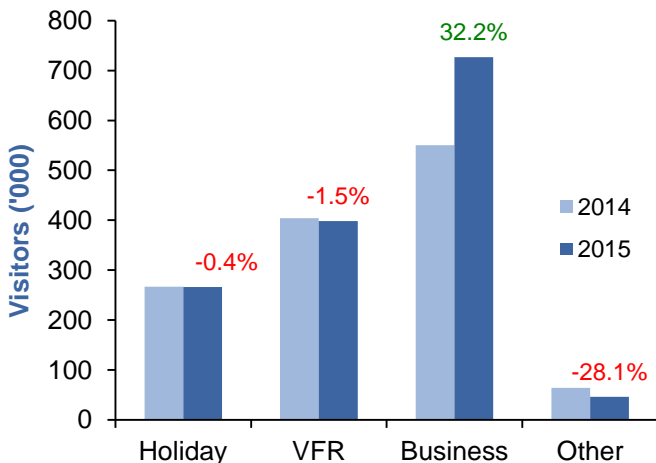


Source Markets

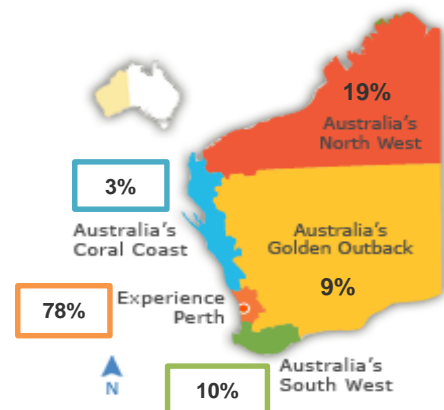
By Visitors



Purpose of Visit



Visitor Dispersal



*Estimates are based on a sample size of 612 and must be considered with the following confidence intervals: Spend $\pm 5.0\%$, Visitors $\pm 9.3\%$, Nights $\pm 9.3\%$

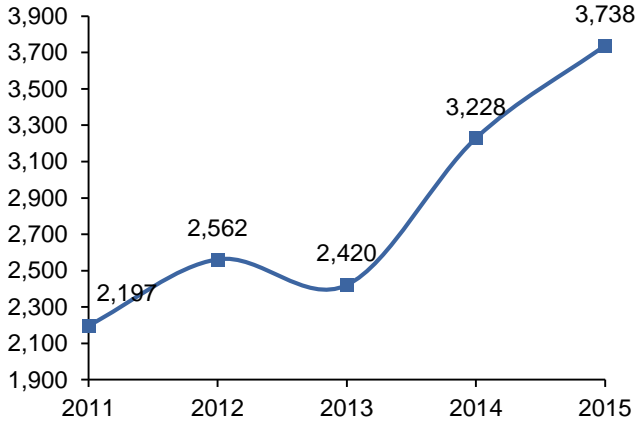
Intrastate Overnight Visitors in Western Australia Market Overview

Spend

(+) 15.8%

- \$3,738 million in spend
- \$128 average spend per visitor

Estimated Spend (\$m)

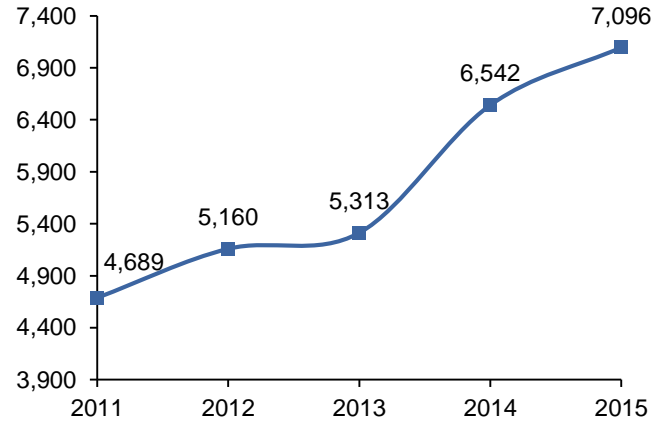


Visitors

(+) 8.5%

- 7.096 million visitors

Estimated Visitors ('000)

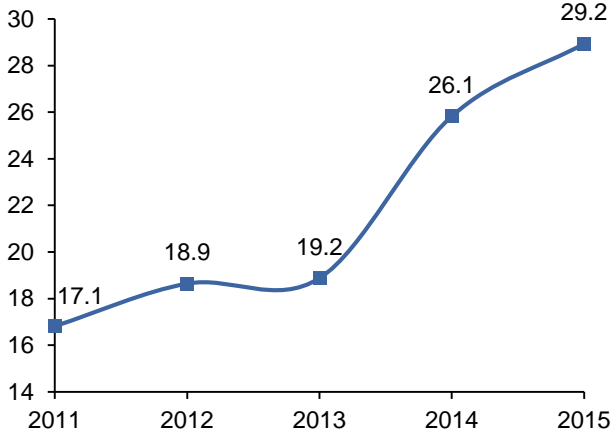


Visitor Nights

(+) 11.9%

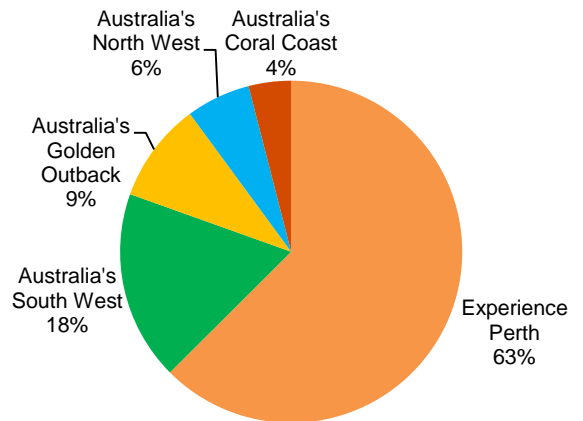
- 29.2 million nights
- 4.1 nights on average

Estimated Nights (Million)

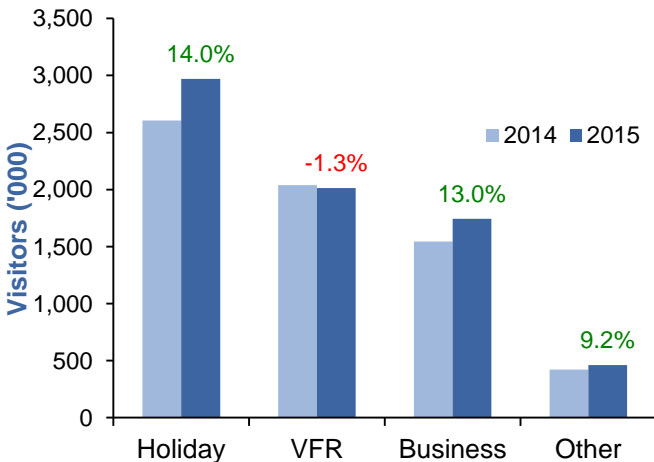


Source Markets

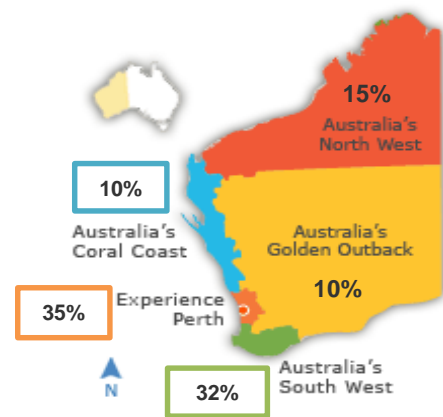
By Visitors



Purpose of Visit



Visitor Dispersal



Intrastate Daytrip Visitors in Western Australia Market Overview

Spend

(+) 19.6%

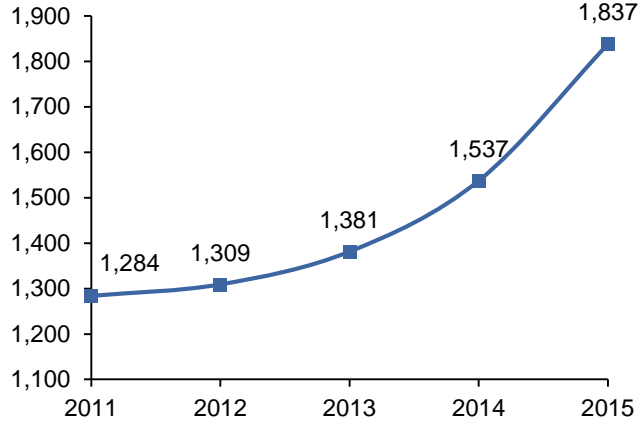
- \$1,837 million in spend
- \$96 average spend per visitor

Visitors

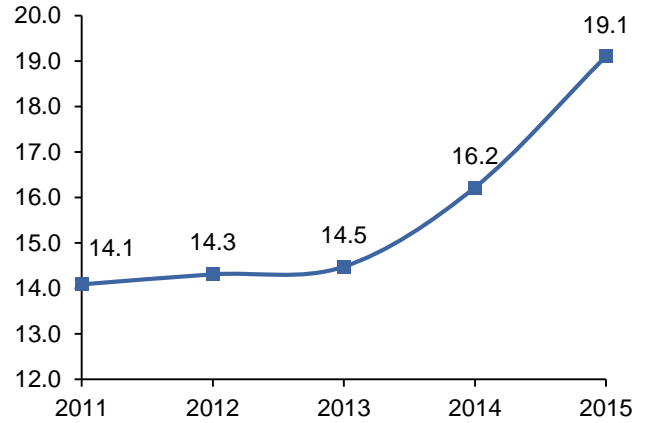
(+) 17.8%

- 19.1 million daytrips

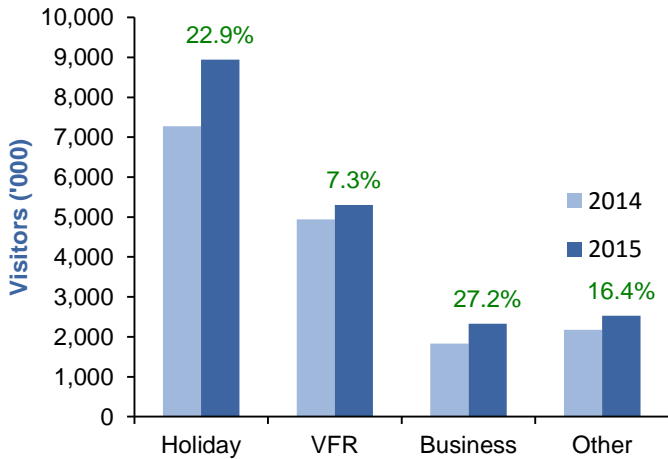
Estimated Spend (\$m)



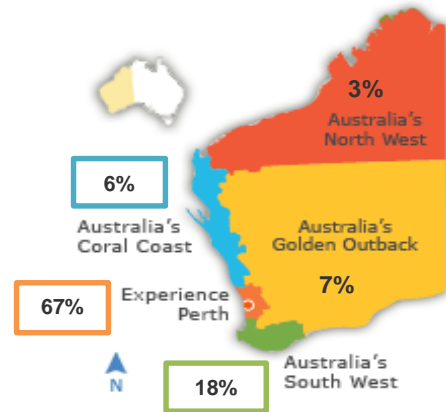
Estimated Visitors ('000)



Purpose of Visit

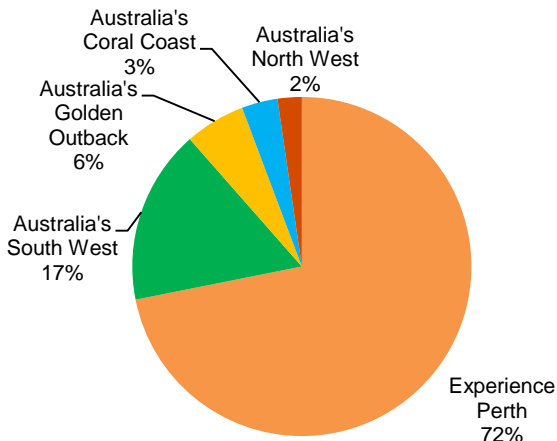


Visitor Dispersal



Source Markets

By Visitors



Source: Tourism Research Australia, International and National Visitor Surveys (visitors aged 15+ years), YE December 2015

For more information on this research please contact the Research Team at Tourism WA:

research@westernaustralia.com

Visitation by Tourism Region

Australia's Coral Coast

	YE Dec-14	YE Dec-15	% Change YE Dec-15 – YE Dec-14
Total			
Visitors	874,200	856,300	-2.0%
Nights	4,944,000	4,736,500	-4.2%
Domestic Total			
Visitors	814,000	786,000	-3.4%
Nights	4,070,000	3,774,000	-7.3%
International			
Visitors	60,200	70,300	16.8%
Nights	874,000	962,500	10.1%

Sample size is too small to split domestic visitation estimates by intrastate / interstate. Note that estimates in the table above need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 12.2%, Nights ± 16.8%;

International CI: Visitors ± 11.7%, Nights ± 27.4%.

Australia's Golden Outback

	YE Dec-14	YE Dec-15	% Change YE Dec-15 – YE Dec-14
Total			
Visitors	755,200	885,500	17.3%
Nights	4,085,400	5,278,200	29.2%
Domestic Total			
Visitors	708,000	839,000	18.5%
Nights	3,170,000	4,457,000	40.6%
Intrastate			
Visitors	632,000	720,000	13.9%
Nights	2,732,000	3,337,000	22.1%
Interstate			
Visitors	76,000	119,000	56.6%
Nights	437,000	1,120,000	156.3%
International			
Visitors	47,200	46,500	-1.5%
Nights	915,400	821,200	-10.3%

Note that estimates in the table above need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 11.8%, Nights ± 15.4%;

Intrastate CI: Visitors ± 12.8%, Nights ± 17.8%;

Interstate CI: Visitors ± 30.9%, Nights ± 30.6%;

International CI: Visitors ± 14.3%, Nights ± 29.4%.

Visitation by Tourism Region Cont.

Australia's North West

	YE Dec-14	YE Dec-15	% Change YE Dec-15 – YE Dec-14
Total			
Visitors	1,181,200	1,374,600	16.4%
Nights	12,679,500	13,439,000	6.0%
Domestic Total			
Visitors	1,110,000	1,298,000	16.9%
Nights	10,411,000	11,658,000	12.0%
Intrastate			
Visitors	858,000	1,033,000	20.4%
Nights	6,830,000	8,013,000	17.3%
Interstate			
Visitors	252,000	265,000	5.2%
Nights	3,582,000	3,646,000	1.8%
International			
Visitors	71,200	76,600	7.6%
Nights	2,268,500	1,781,000	-21.5%

Note that estimates in the table above need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 9.5%, Nights ± 9.6%;

Intrastate CI: Visitors ± 10.7%, Nights ± 11.5%;

Interstate CI: Visitors ± 20.9%, Nights ± 17.0%;

International CI: Visitors ± 11.3%, Nights ± 20.8%.

Visitation by Tourism Region Cont.

Australia's South West

	YE Dec-14	YE Dec-15	% Change YE Dec-15 – YE Dec-14
Total			
Visitors	2,356,500	2,568,400	9.0%
Nights	9,342,900	10,116,300	8.3%
Domestic Total			
Visitors	2,229,000	2,409,000	8.1%
Nights	7,299,000	7,807,000	7.0%
Intrastate			
Visitors	2,105,000	2,274,000	8.0%
Nights	6,680,000	7,147,000	7.0%
Interstate			
Visitors	124,000	136,000	9.7%
Nights	620,000	660,000	6.5%
International			
Visitors	127,500	159,400	25.0%
Nights	2,043,900	2,309,300	13.0%

Note that estimates in the table above need to be considered with these Confidence Intervals.

Domestic CI: Visitors \pm 7.0%, Nights \pm 11.7%;

Intrastate CI: Visitors \pm 7.2%, Nights \pm 12.2%;

Interstate CI: Visitors \pm 29.0%, Nights \pm 39.8%;

International CI: Visitors \pm 7.9%, Nights \pm 18.5%.

Visitation by Tourism Region Cont.

Experience Perth

	YE Dec-14	YE Dec-15	% Change YE Dec-15 – YE Dec-14
Total			
Visitors	4,078,500	4,353,900	6.8%
Nights	33,578,700	35,688,700	6.3%
Domestic Total			
Visitors	3,306,000	3,553,000	7.5%
Nights	11,149,000	13,395,000	20.1%
Intrastate			
Visitors	2,355,000	2,478,000	5.2%
Nights	6,188,000	7,066,000	14.2%
Interstate			
Visitors	951,000	1,075,000	13.0%
Nights	4,962,000	6,329,000	27.5%
International			
Visitors	772,500	800,900	3.7%
Nights	22,429,700	22,293,700	-0.6%

Note that estimates in the table above need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 5.8%, Nights ± 8.9%;

Intrastate CI: Visitors ± 6.9%, Nights ± 12.3%;

Interstate CI: Visitors ± 10.5%, Nights ± 13.0%;

International CI: Visitors ± 3.7%, Nights ± 6.7%.