



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

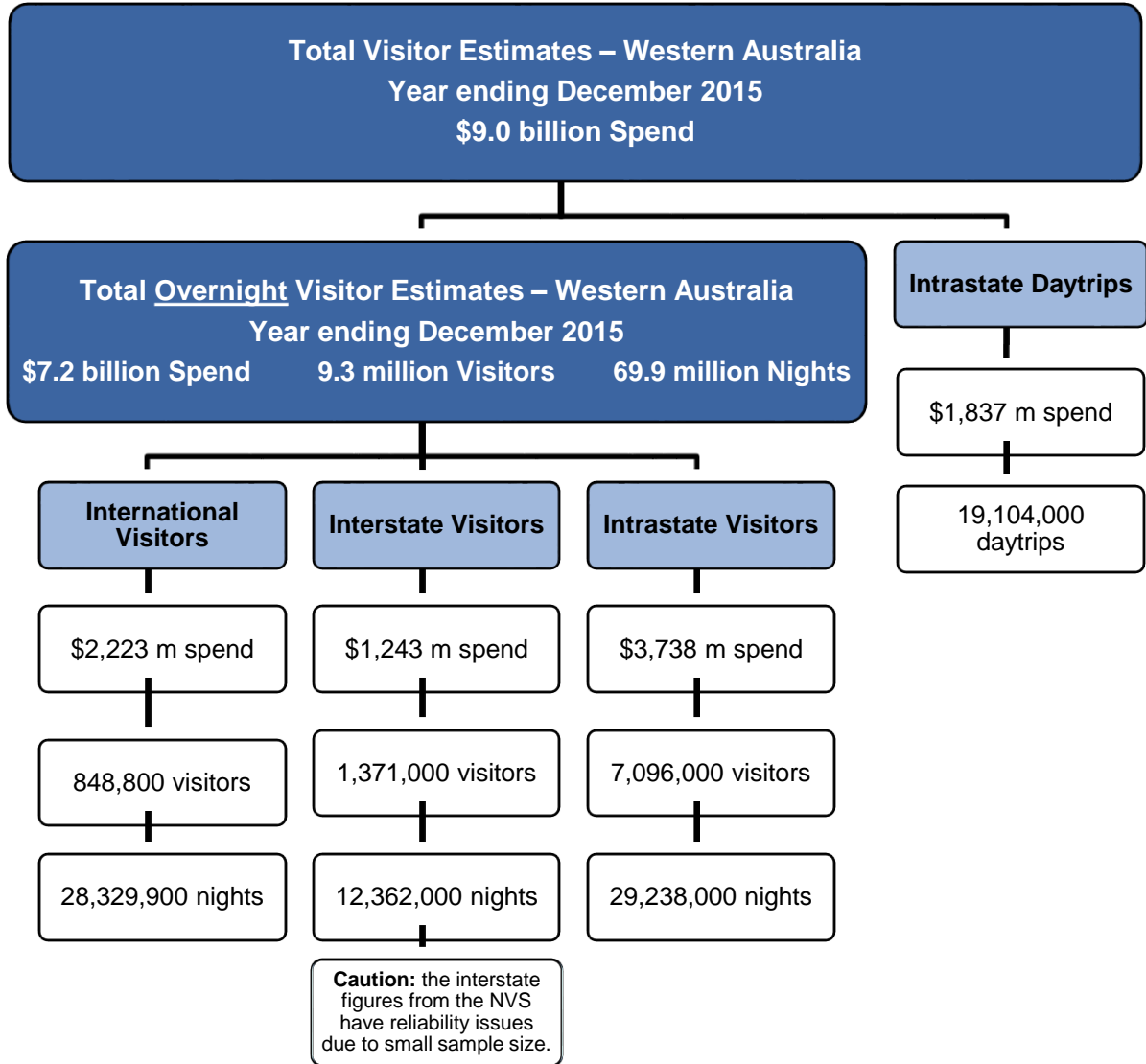
Note that estimates in this document are based on survey data and need to be considered within these Confidence Intervals (CI) for Western Australia YE December 2015 estimates:

- 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



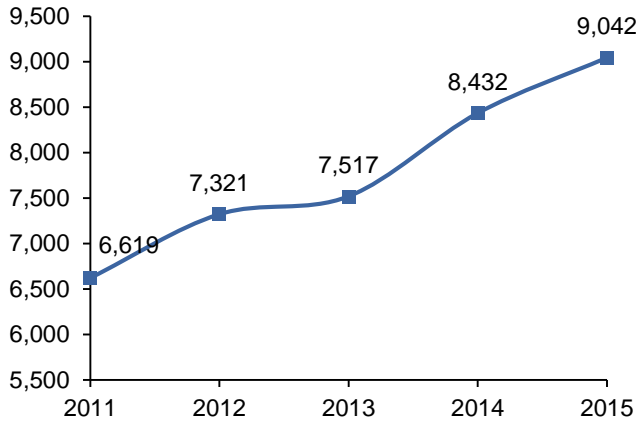
Total Visitors to/within Western Australia Market Overview

Spend

(+) 7.2%

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

Estimated Spend (\$m)

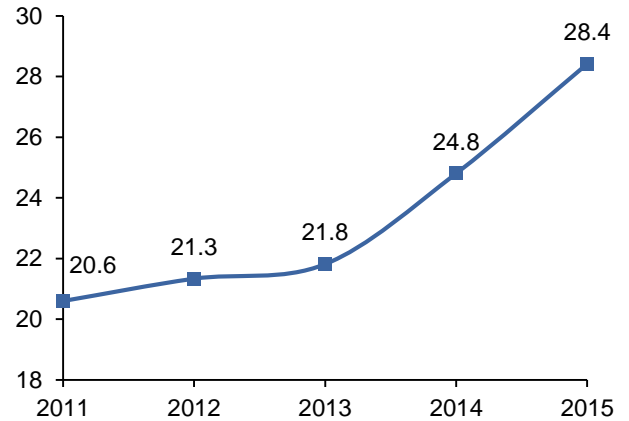


Visitors

(+) 14.6%

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

Estimated Visitors (Million)

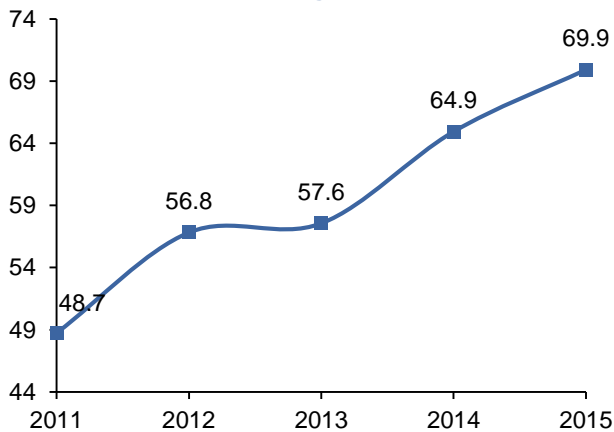


Visitor Nights

(+) 7.7%

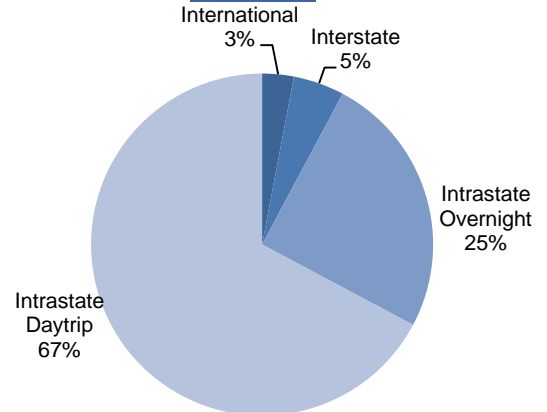
- 69.9 million nights
- 7.5 nights on average (based on overnight visitors only)
- 12.3% of visitor nights in Australia

Estimated Nights (Million)

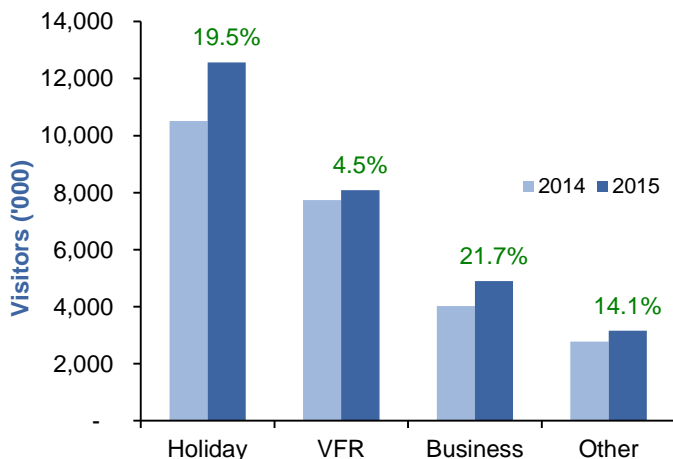


Source Markets

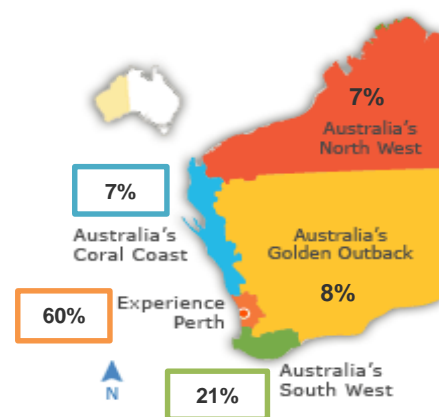
By Visitors



Purpose of Visit



Visitor Dispersal



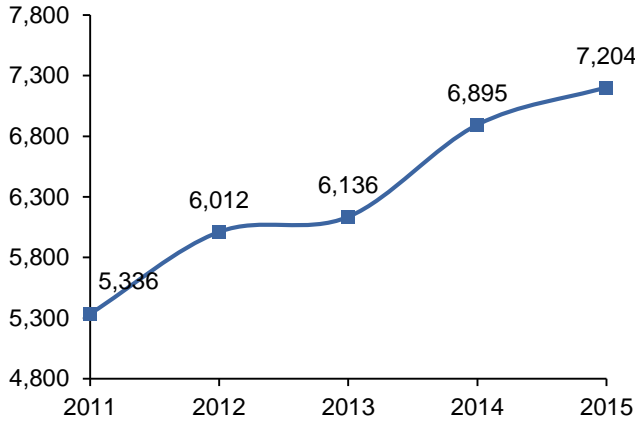
Overnight Visitors to Western Australia Market Overview

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)

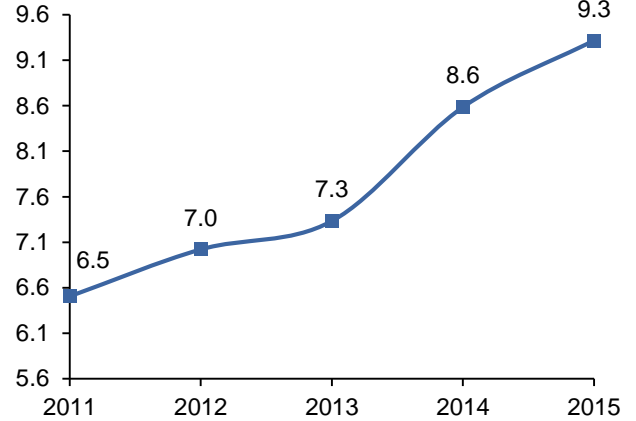


Visitors

(+) 8.5%

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

Estimated Visitors (Million)

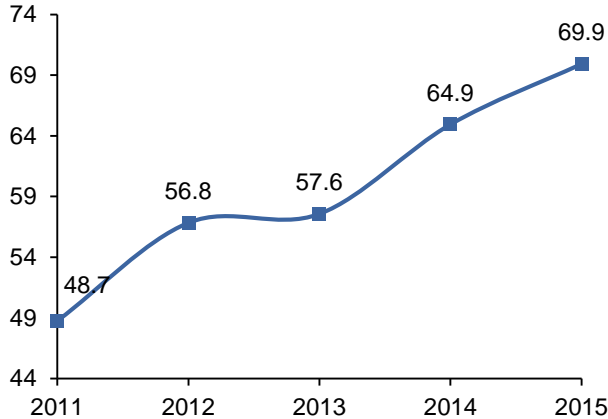


Visitor Nights

(+) 7.7%

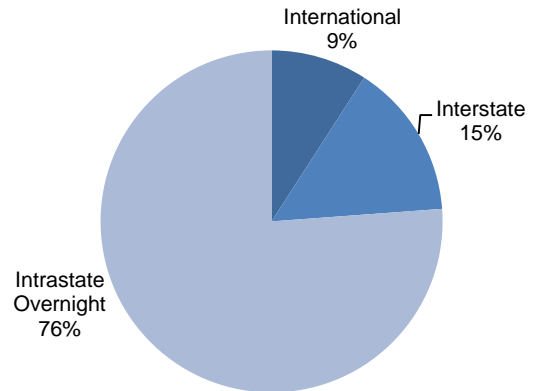
- 69.9 million nights
- 7.5 nights on average
- 12.3% of visitor nights in Australia

Estimated Nights (Million)

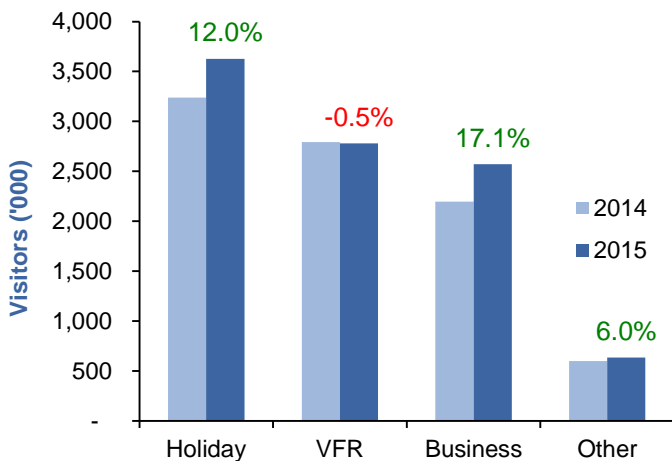


Source Markets

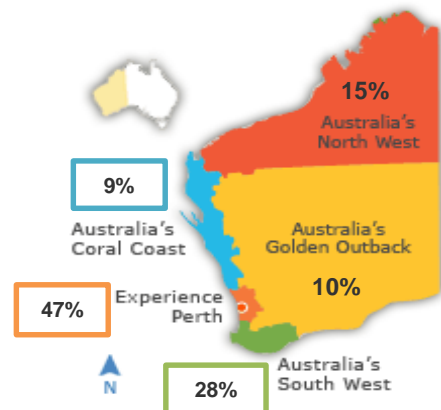
By Visitors



Purpose of Visit



Visitor Dispersal



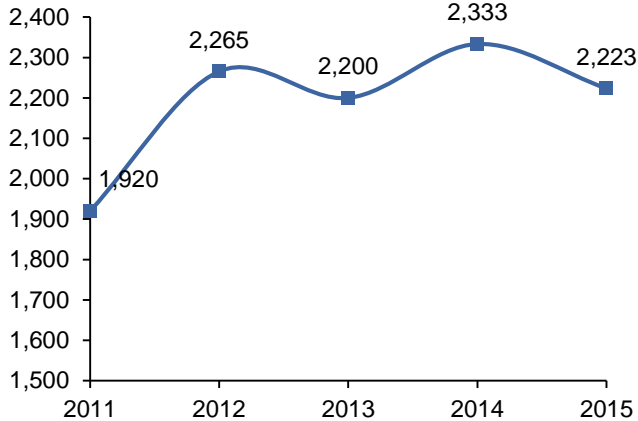
International Visitors to Western Australia Market Overview

Spend

(-) 4.7%

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

Estimated Spend (\$m)

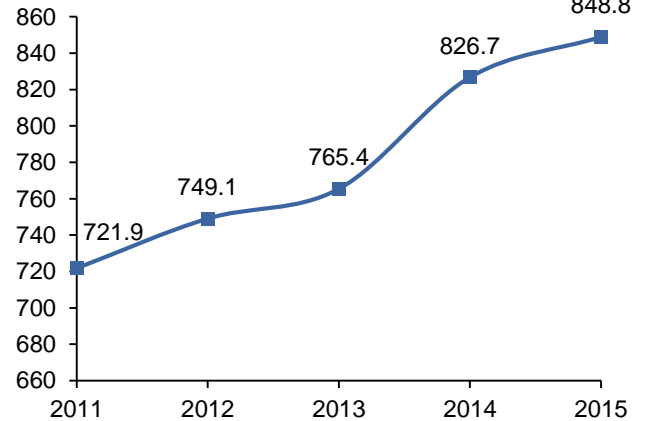


Visitors

(+) 2.7%

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

Estimated Visitors ('000)

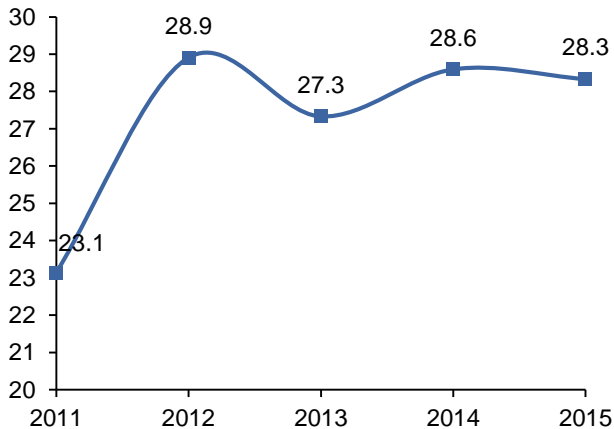


Visitor Nights

(-) 0.9%

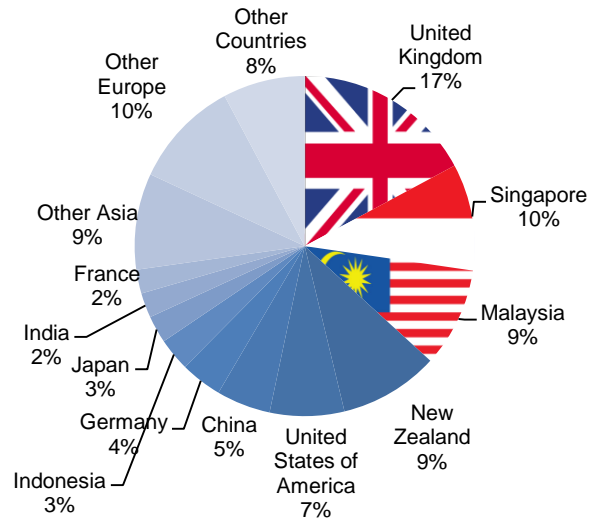
- 28.3 million nights
- 33.4 nights on average
- 11.4% of international visitor nights in Australia

Estimated Nights (Million)

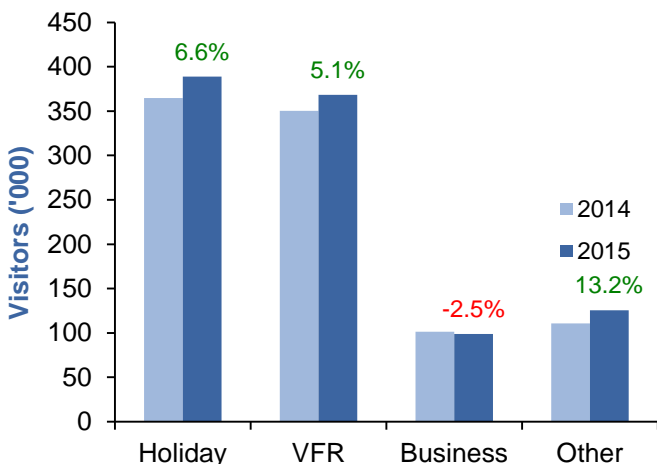


Source Markets

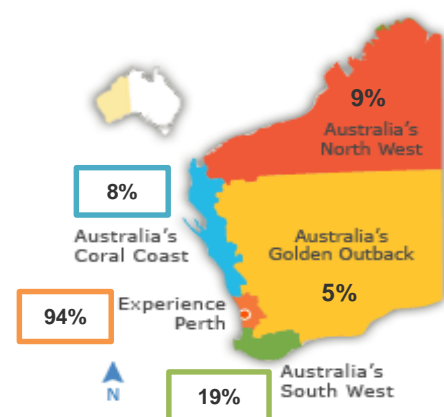
By Visitors



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% |

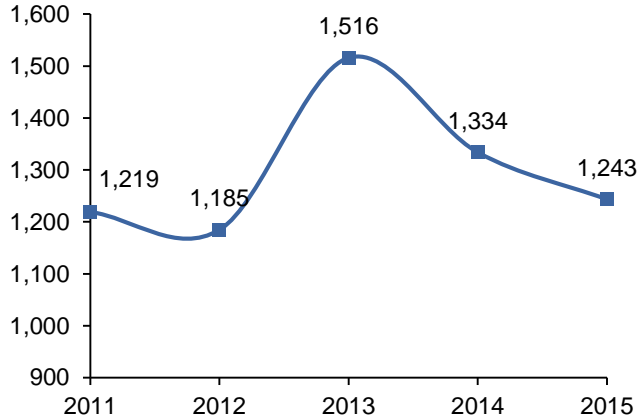
Interstate Visitors to Western Australia Market Overview*

Spend

(-) 6.8%

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

Estimated Spend (\$m)

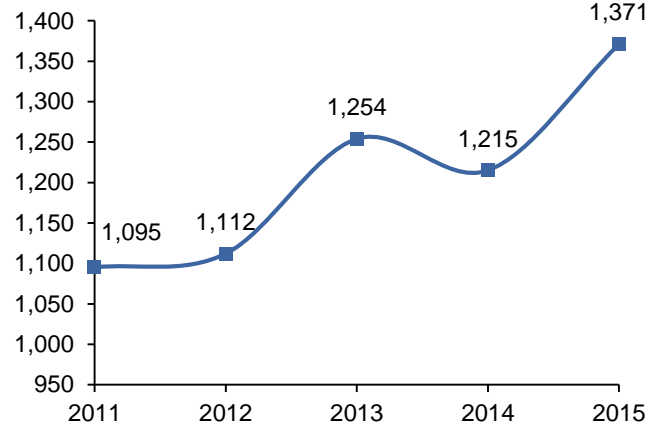


Visitors

(+) 12.8%

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

Estimated Visitors ('000)

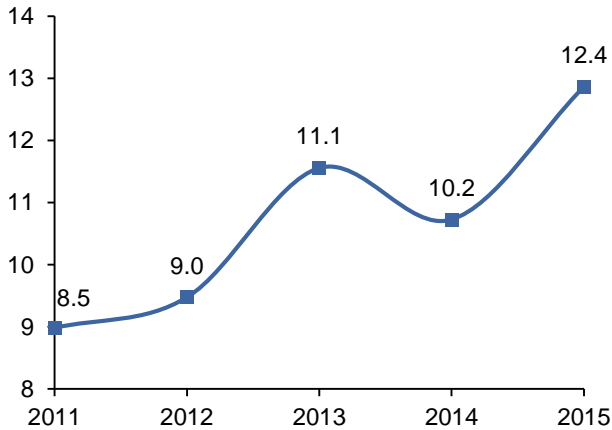


Visitor Nights

(+) 20.9%

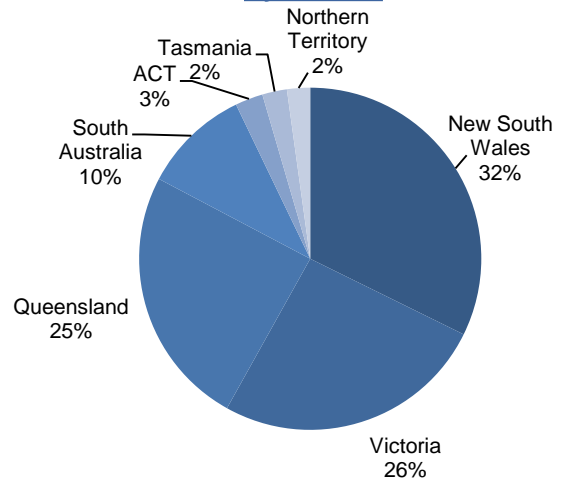
- 12.4 million nights
- 9.0 nights on average
- 8.8% of interstate visitor nights in Australia

Estimated Nights (Million)

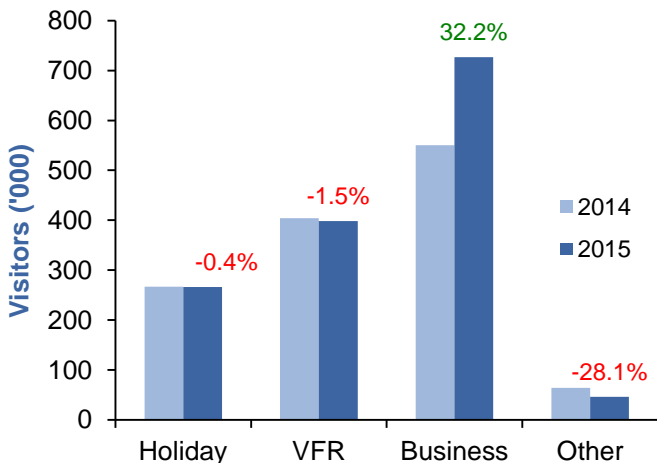


Source Markets

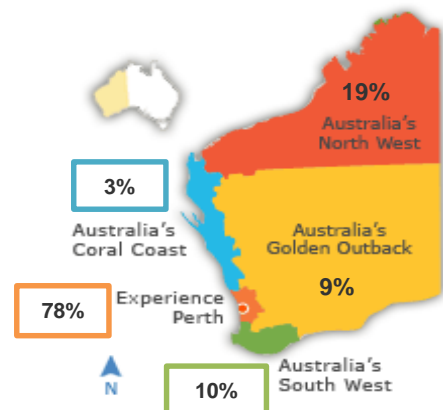
By Visitors



Purpose of Visit



Visitor Dispersal



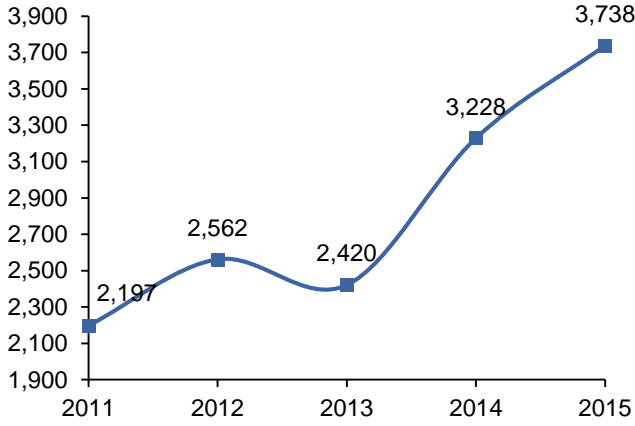
*Estimates are based on a sample size of 612 and must be considered with the following confidence intervals: Spend $\pm 5.0\%$, Visitors $\pm 9.3\%$, Nights $\pm 9.3\%$

Intrastate Overnight Visitors in Western Australia Market Overview

Spend (+) 15.8%

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

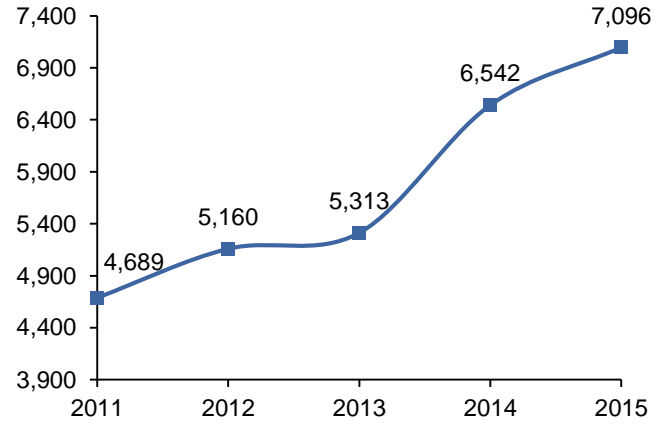
Estimated Spend (\$m)



Visitors (+) 8.5%

- 7.096 million visitors

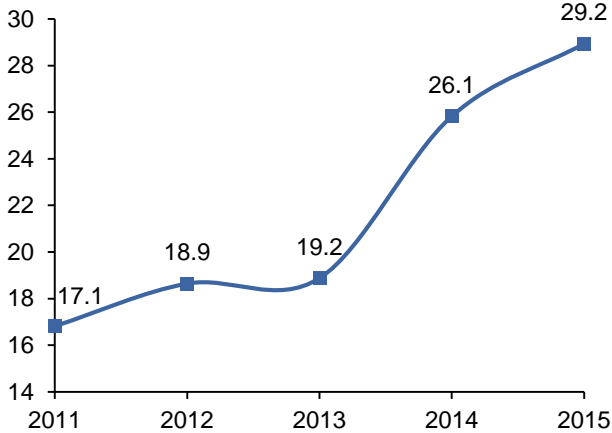
Estimated Visitors ('000)



Visitor Nights (+) 11.9%

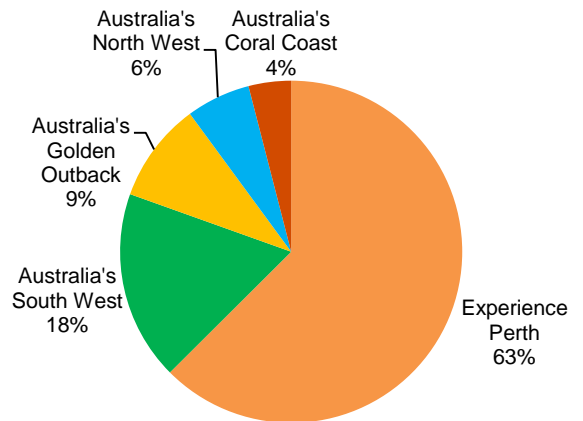
- 29.2 million nights
- 4.1 nights on average

Estimated Nights (Million)

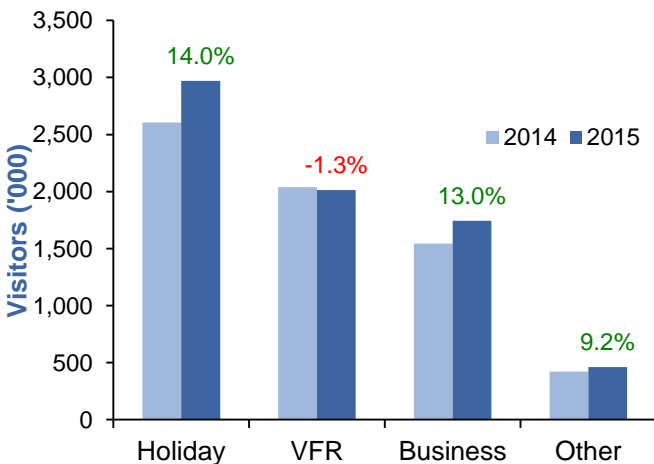


Source Markets

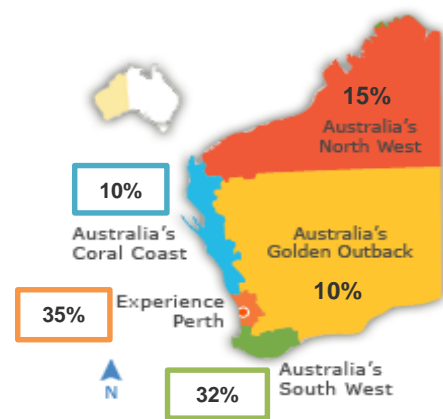
By Visitors



Purpose of Visit



Visitor Dispersal



Intrastate Daytrip Visitors in Western Australia Market Overview

Spend

(+) 19.6%

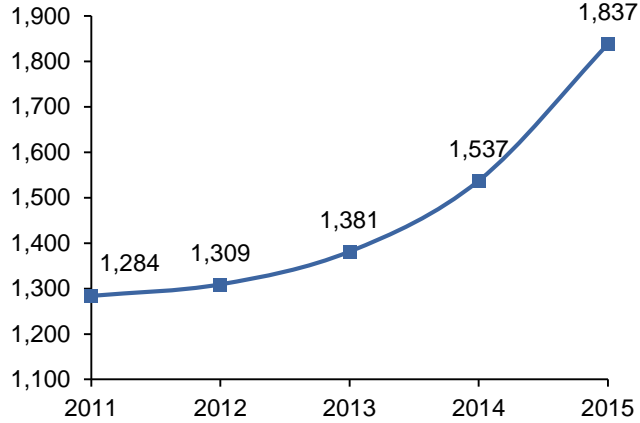
- \$1,837 million in spend
- \$96 average spend per visitor

Visitors

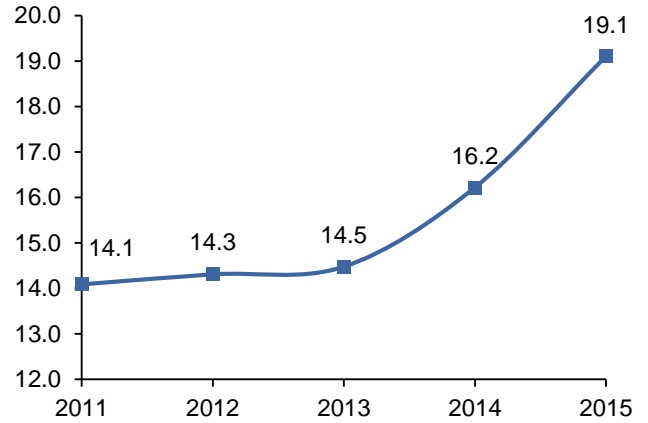
(+) 17.8%

- 19.1 million daytrips

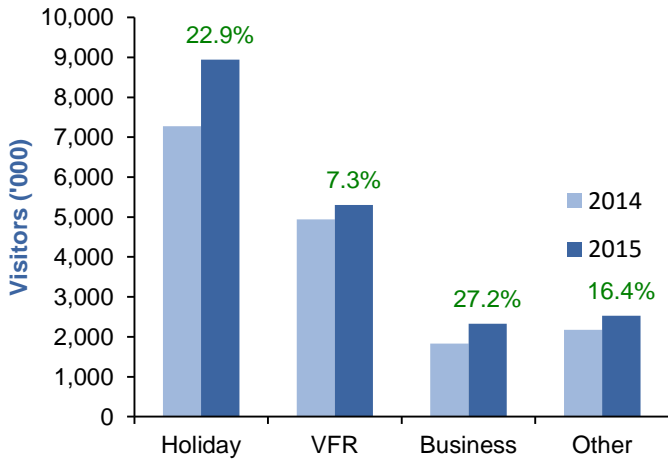
Estimated Spend (\$m)



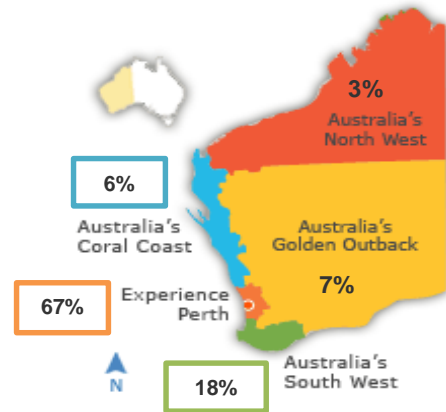
Estimated Visitors ('000)



Purpose of Visit

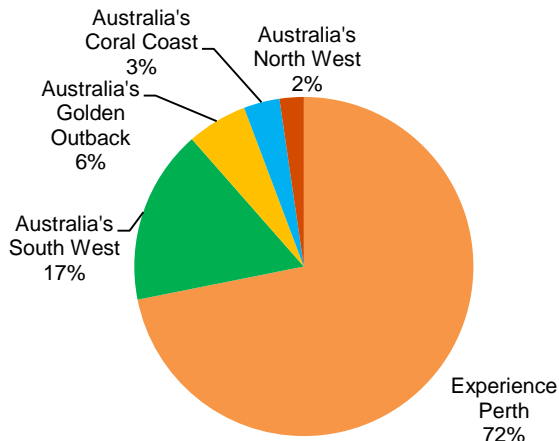


Visitor Dispersal



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%.