

WA TOURISM SNAPSHOT

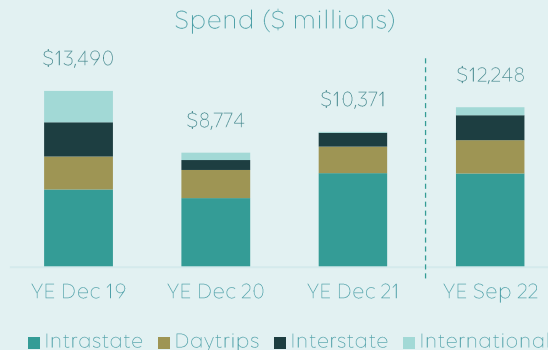
Visitors & Spend in year ending September 2022 (YE Sep 22)

Compared to calendar year 2019 as a pre-COVID benchmark



10.5 million overnight visitors and 20.0 million daytrip visitors spent \$12.2 billion in WA

In YE Sep 22, 20.0 million daytrips were taken within the State and 10.5 million overnight (domestic and international) visitors came to or travelled within WA. Together, these visitors spent \$12.2 billion in the State \$6.4 billion (52%) of which was spent in regional WA. Visitor spend is (-) \$1.2 billion or (-) 9% behind pre-COVID. The national decline for the same period was (-) 12% showing WA is performing better than Australia as a whole.



| Market | WA Visitors | | WA Spend | | | Australia Spend % Change vs. 2019 (%) |
|---------------------------|---------------------|---------------------|---------------------|--------------------------|-----------------------|---------------------------------------|
| | YE Sep 22 (million) | Change vs. 2019 (%) | YE Sep 22 (billion) | Change vs. 2019(billion) | % Change vs. 2019 (%) | |
| Intrastate overnight | 9.3 | 1% | \$7.2 | \$1.2 | 21% | 20% |
| Interstate overnight | 1.0 | -46% | \$1.9 | -\$0.7 | -26% | -5% |
| Domestic overnight | 10.3 | -7% | \$9.1 | \$0.5 | 6% | 8% |
| Domestic daytrip | 20.0 | -17% | \$2.5 | -\$0.0 | -1% | -5% |
| International | 0.2 | -78% | \$0.6 | -\$1.8 | -75% | -72% |
| Total | 30.5 | -16% | \$12.2 | -\$1.2 | -9% | -12% |

Total Spend in WA by 12-month period (\$ billions)

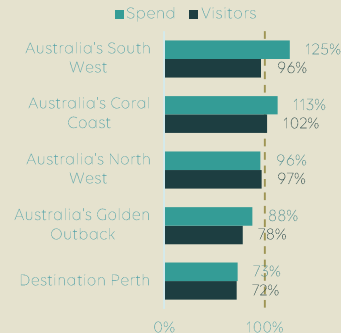


Destination Perth continues to be impacted, whilst Regional WA sees mixed results.

Australia's South West and Australia's Coral Coast have seen strong spend results driven by increased average daily spend.

Destination Perth remains heavily impacted by the shortfall from out-of-state visitors, whilst the declines for Australia's Golden Outback are mainly from fewer intrastate visitors.

Regional visitation vs. pre-COVID



Source: Tourism Research Australia, International and National Visitor Surveys. More details can be found in the interactive charts on [Tourism WA Corporate Website](#)



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International Visitors in April to September 2022

Compared to April to September 2019 as a pre-COVID benchmark



International visitors continue to rise

WA welcomed 194,700 international visitors, a decline of (-) 56% vs. pre-COVID. This is ahead of the national average of (-) 58% despite WA's delayed border opening.

International Visitors to WA (000s) - by quarter



International Visitors to WA - April to September

Tourism WA Key Markets Ranked by Size of Market

| Rank | Market | Visitors in 2022 (000s) | Change vs. 2019 | AUS change vs. 2019 |
|------|----------------------------|-------------------------|-----------------|---------------------|
| 1 | Singapore | 39.9 | -29% | -32% |
| 2 | United Kingdom | 24.2 | -42% | -37% |
| 3 | New Zealand | 19.5 | -50% | -47% |
| 4 | India | 15.5 | -2% | -13% |
| 5 | United States of America | 11.7 | -53% | -58% |
| 6 | Malaysia | 8.4 | -85% | -77% |
| 7 | Indonesia | 6.1 | -68% | -59% |
| 8 | Germany | 5.0 | -56% | -54% |
| 9 | Hong Kong | 2.5 | -83% | -85% |
| 10 | China | 2.4 | -93% | -93% |
| 11 | Italy | 2.1 | -57% | -47% |
| 12 | Japan | 1.5 | -91% | -83% |
| 13 | Switzerland | 0.9 | -86% | -55% |
| | Rest of the World | 55.1 | -47% | -50% |
| | Total International | 194.7 | -56% | -58% |



Singapore, UK & NZ and India account for half of international visitors to WA

Singapore was WA's top international market for visitors, a total of 39,900 visitors, a decline of (-) 29% compared to pre-COVID, ahead of the National decline of (-) 32%. The UK and New Zealand followed, with declines of (-) 42% and (-) 50% respectively.

India saw the strongest recovery, with visitor numbers just (-) 2% behind pre-COVID levels, increasing its rank to 4th from 8th pre-COVID. Together, these top 4 markets accounted for half (51%) of all international visitors to WA.

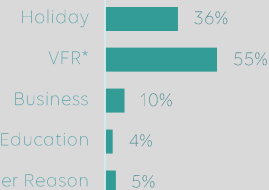
China, Hong Kong, Malaysia, Japan and Switzerland have seen the slowest recovery, tracking around (-) 90% vs. 2019.



Visiting friends and relatives (VFR) is driving international visitation to WA

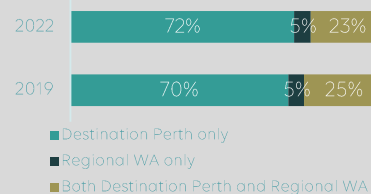
More than half (55%) of visitors to WA were visiting friends and relatives (VFR). Encouragingly over a third (36%) came for a holiday, in line with the National average.

Proportion of Trips



Adds up to more than 100% as visitors can come to WA for more than one purpose.

Where international visitors went



Three in ten (28%) visitors spent one or more nights in Regional WA, similar to pre-COVID (30%).

Source: Tourism Research Australia, International and National Visitor Surveys. Department of Home Affairs, Overseas Arrivals and Departures. Note, spend is not modeled at a quarterly level. * Visiting Friends or Relatives. More details can be found in the interactive charts on [Tourism WA Corporate Website](#)

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Australian Visitors in April to September 2022

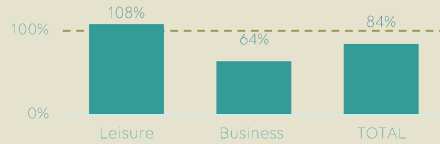
Compared to April to September 2019 as a pre-COVID benchmark



Interstate visitors rising yet still behind pre-COVID levels

WA welcomed 831,000 interstate visitors, a decline of (-) 16% compared to pre-COVID. Leisure* visitors however grew by (+) 8%.

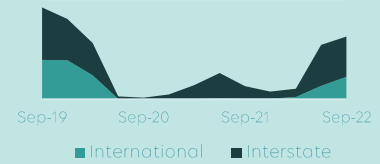
Interstate Visitor Purpose



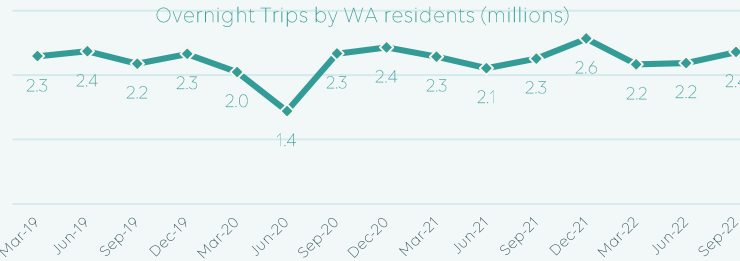
WA residents remain reticent to travel outside of WA

WA residents took (-) 17% fewer interstate and (-) 53% fewer international trips compared to pre-COVID.

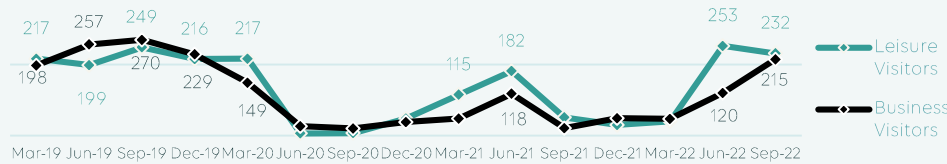
WA Resident Out-of-State Trips



WA residents continue to travel in the state, whilst most other states saw a drop in intrastate trips



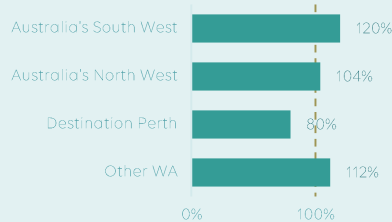
Interstate Visitors to WA by Quarter (000s) – Leisure v Business visitors



Interstate business visitors remain behind pre-COVID levels but on the rise

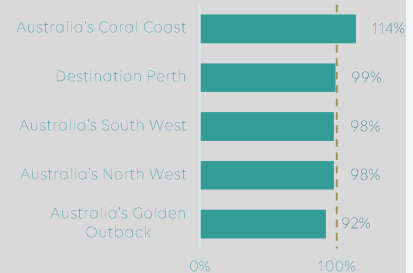
The shortfall in total interstate visitors was driven by a (-) 36% reduction in business related visitors. This is reflected in the shortfall of visitors to Destination Perth of (-) 20% whilst visitation to all of WA's regions increased. Encouragingly the number of business visitors is on the rise.

Where interstate visitors went



WA residents took a similar number of intrastate trips as they did pre-COVID, whilst all other States apart from Queensland saw a drop. West Aussies even took more intrastate trips this year than they did in 2021 when the borders were closed!

Where WA residents went



They generally travelled to the same parts of the State as they did pre-COVID with the exception of Australia's Coral Coast which grew by 14%.

Source: Tourism Research Australia, International and National Visitor Surveys, Department of Home Affairs, Overseas Arrivals and Departures. Note, spend is not modeled at a quarterly level. *Leisure is holiday and/or Visiting Friends or Relatives (VFR). More details can be found in the interactive charts on [Tourism WA Corporate Website](#)