

Tourism Western Australia

Fast Facts **Year Ending June 2015**

Prepared by the Research Team

September 2015



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 YE June 2015 are not directly comparable to domestic estimates for YE June 2014**. It is important to keep this change in methodology in mind when looking at changes over time in the NVS results.

Confidence Intervals and Sample Sizes

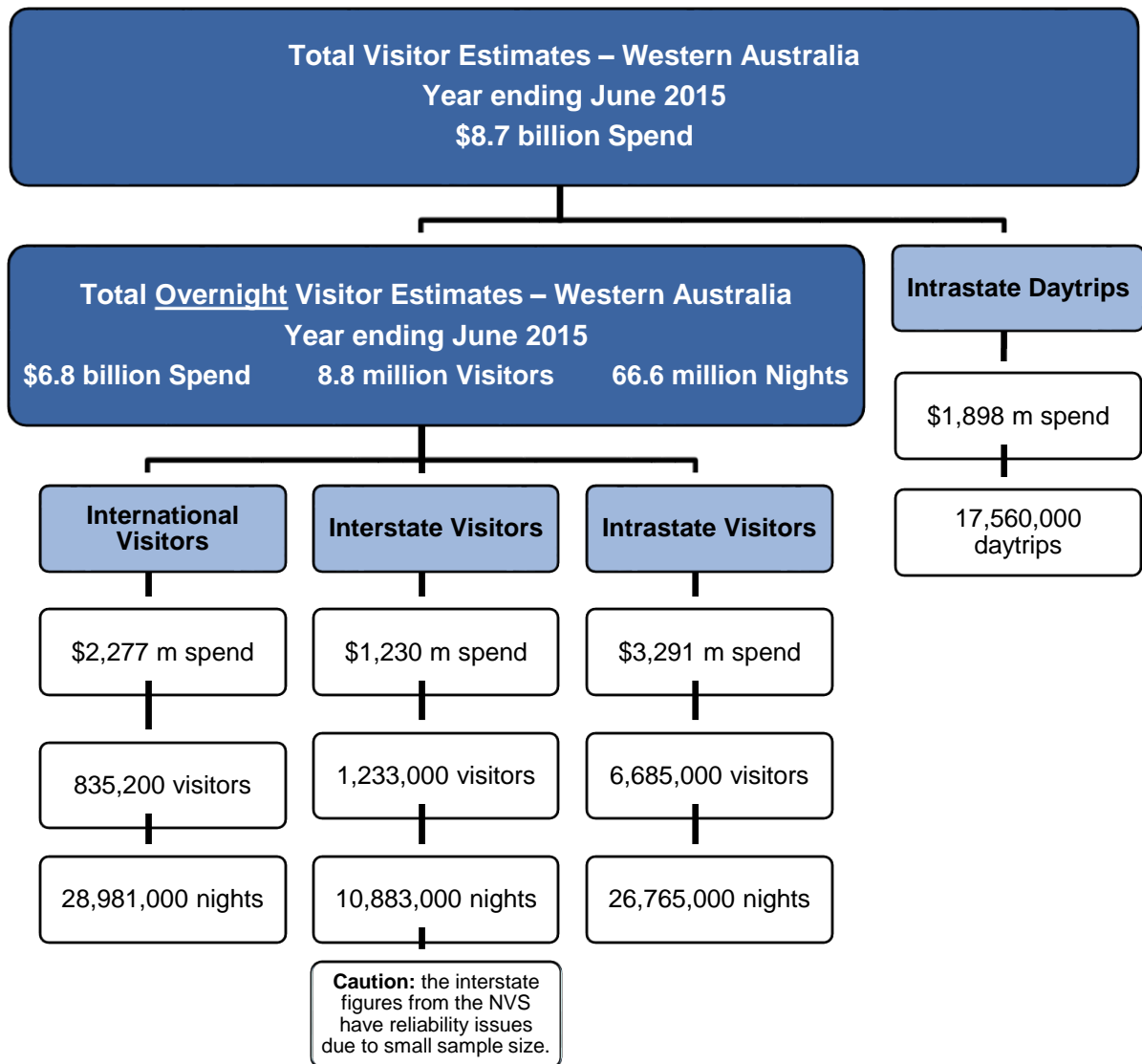
Note that estimates in this document are based on survey data and need to be considered within these Confidence Intervals (CI) for Western Australia YE June 2015 estimates:

- Intrastate CI: Spend $\pm 5.0\%$, Visitors $\pm 4.3\%$, Nights $\pm 6.3\%$
- Interstate CI: Spend $\pm 5.0\%$, Visitors $\pm 9.8\%$, Nights $\pm 9.9\%$
- International CI: Spend $\pm 6.1\%$, Visitors $\pm 3.6\%$, Nights $\pm 5.9\%$
- Intrastate Daytrip CI: Spend $\pm 7.2\%$, Visitors $\pm 4.6\%$

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

- Intrastate Visitors: n= 3,097
- Interstate Visitors: n= 580
- Domestic Spend: n= 3,394
- International: Spend n= 5,121, Visitors n= 5,910
- Intrastate Daytrip: Spend n= 2,180, Visitors n= 2,180

Total Visitors to/within Western Australia Market Overview



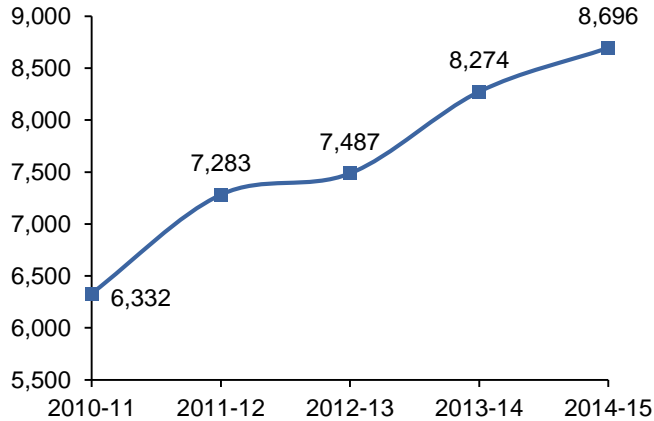
Total Visitors to/within Western Australia Market Overview

Spend

(+) 5.1%

- \$8,696 million in spend
- \$330 average spend per visitor
- 10.4% of visitor spend in Australia

Estimated Spend (\$m)

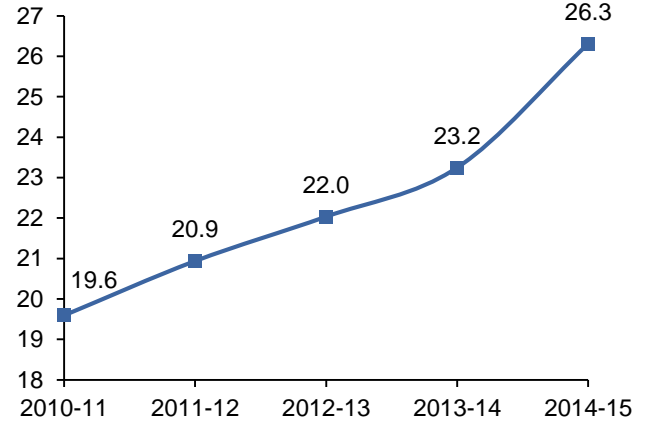


Visitors

(+) 13.2%

- 26.3 million visitors (including both overnight visitors and daytrips)
- 10.5% of visitors to/within Australia

Estimated Visitors (Million)

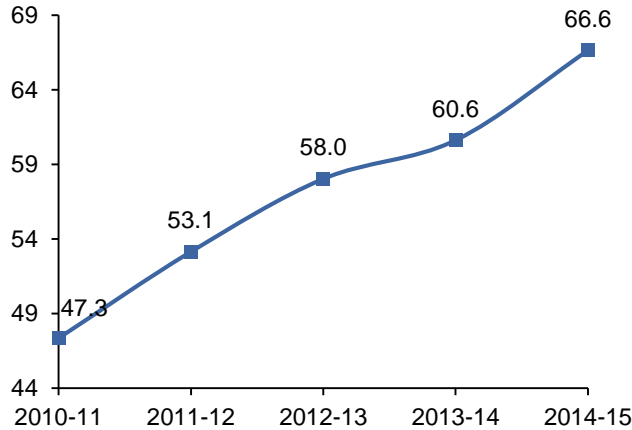


Visitor Nights

(+) 9.9%

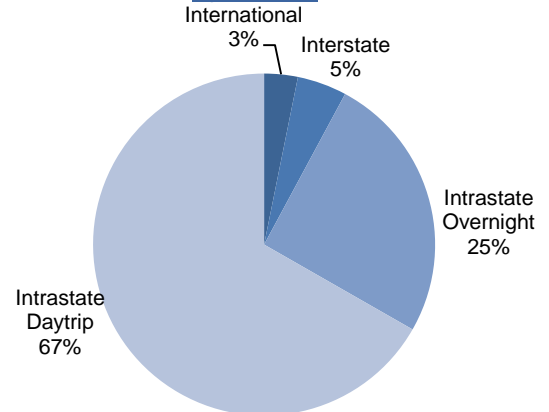
- 66.6 million nights
- 7.6 nights on average
- 12.1% of visitor nights in Australia

Estimated Nights (Million)

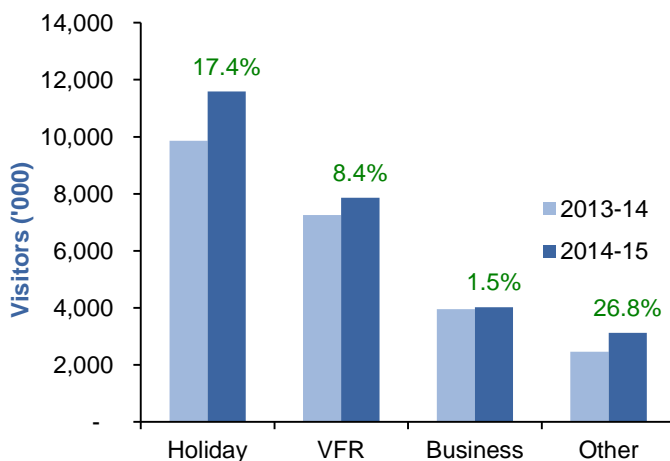


Source Markets

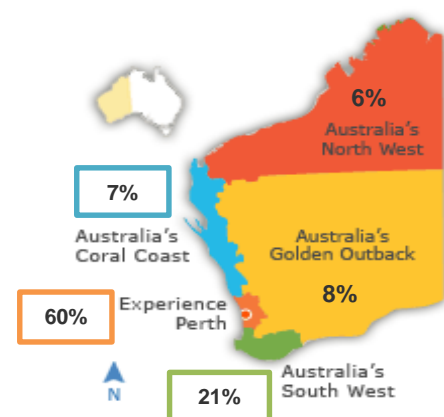
By Visitors



Purpose of Visit



Visitor Dispersal



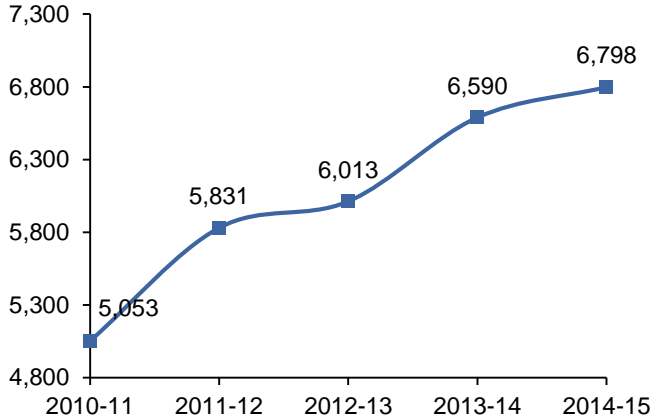
Overnight Visitors to Western Australia Market Overview

Spend

(+) 3.2%

- \$6,798 million in spend
- \$777 average spend per visitor
- 10.4% of overnight visitor spend in Australia

Estimated Spend (\$m)

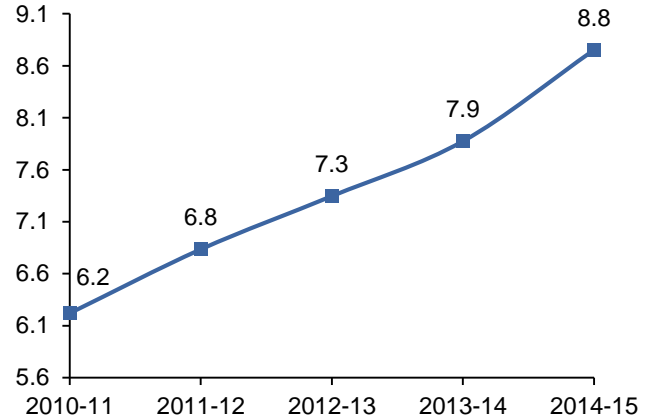


Visitors

(+) 11.1%

- 8.8 million visitors
- 9.6% of overnight visitors in Australia

Estimated Visitors (Million)

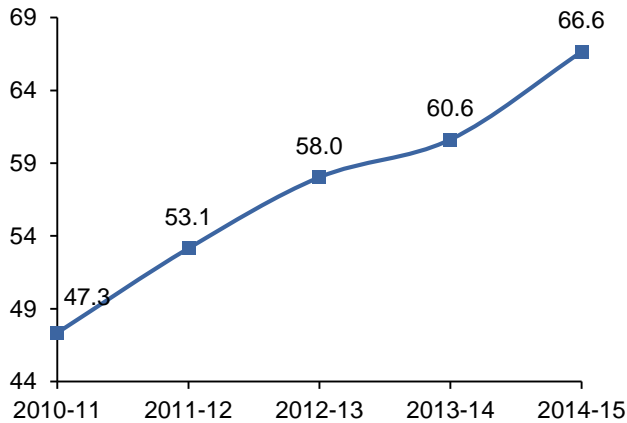


Visitor Nights

(+) 9.9%

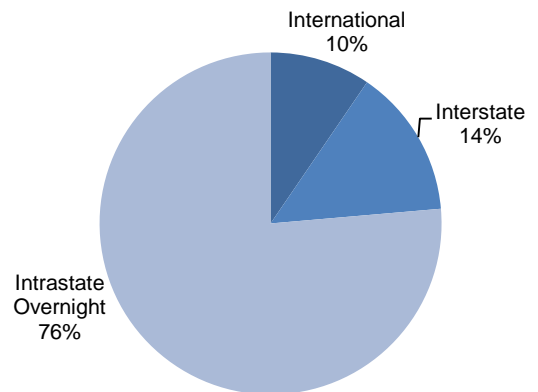
- 66.6 million nights
- 7.6 nights on average
- 12.1% of visitor nights in Australia

Estimated Nights (Million)

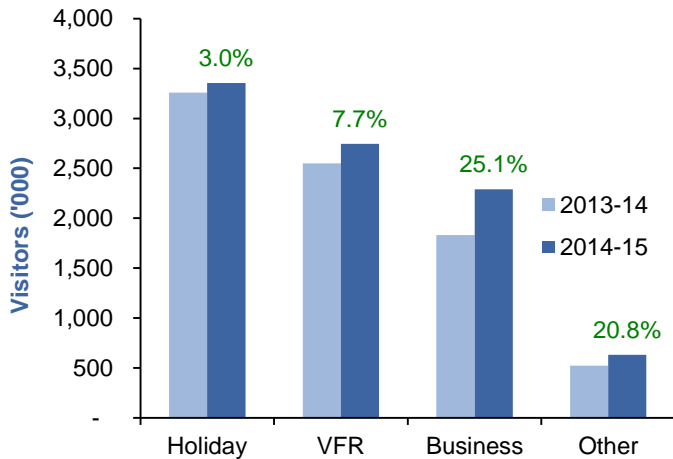


Source Markets

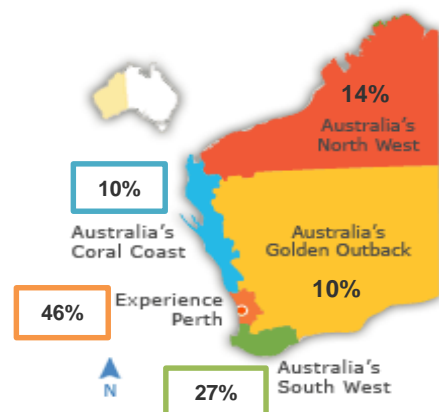
By Visitors



Purpose of Visit



Visitor Dispersal



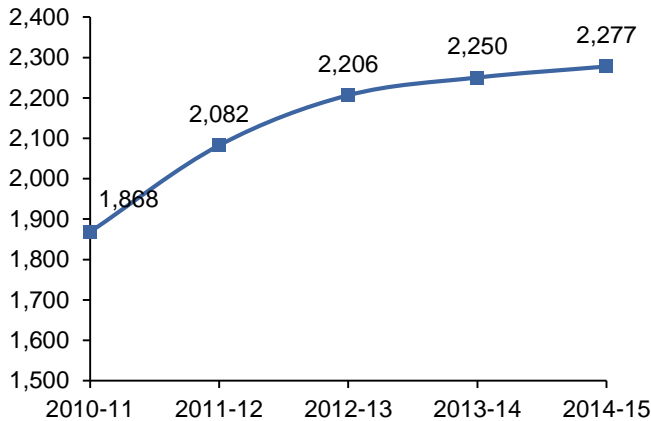
International Visitors to Western Australia Market Overview

Spend

(+) 1.2%

- \$2,277 million in spend
- \$2,727 average spend per visitor
- 10.8% of international spend in Australia

Estimated Spend (\$m)

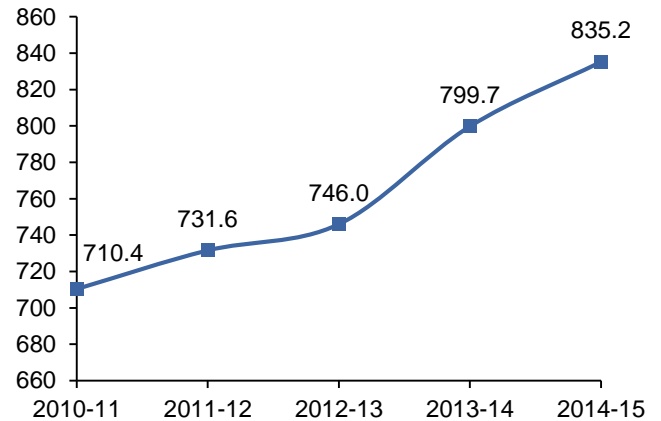


Visitors

(+) 4.4%

- 835,200 visitors
- 12.7% of international visitors to Australia

Estimated Visitors ('000)

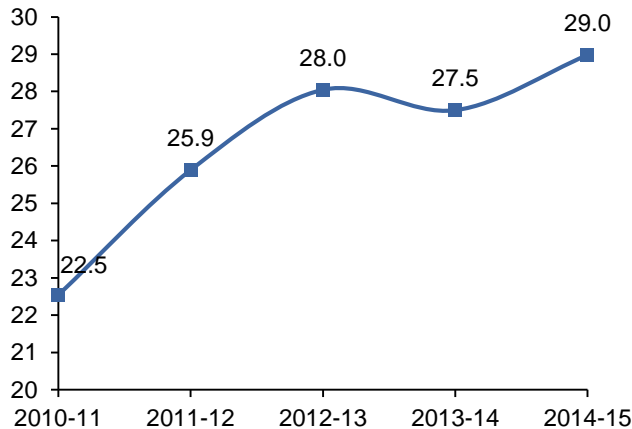


Visitor Nights

(+) 5.4%

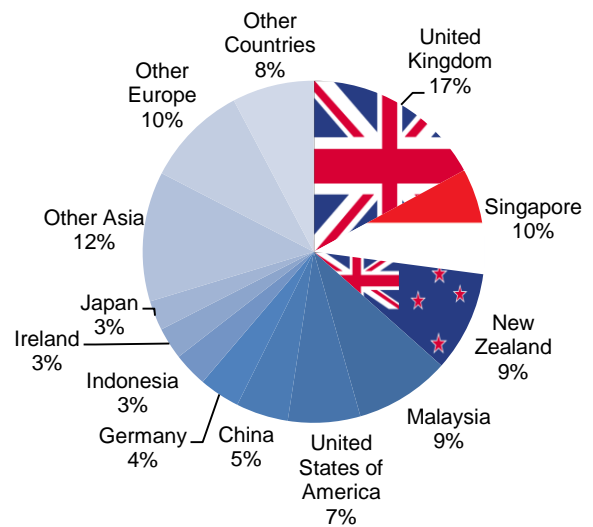
- 29.0 million nights
- 34.7 nights on average
- 12.3% of international visitor nights in Australia

Estimated Nights (Million)

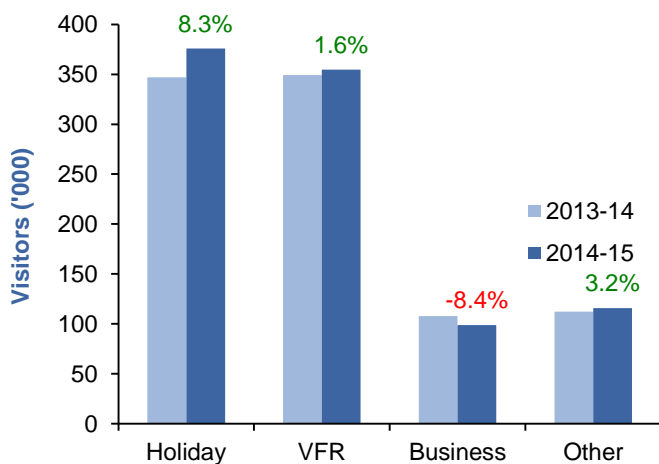


Source Markets

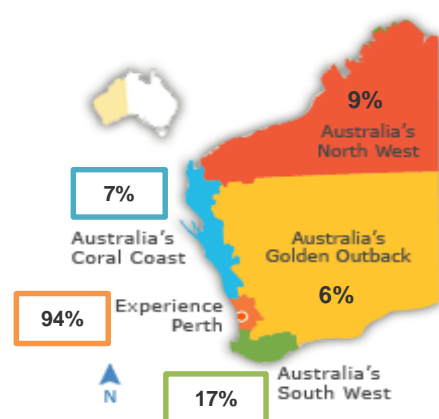
By Visitors



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 Jun-14	YE Jun-15	% Change	3 Year AAGR	Rank	YE Jun-14	YE Jun-15	% Change	3 Year AAGR
UK	1	334	312	-6.7%	-3.8%	2	1,894	1,927	1.7%	3.6%
China	2	180	205	13.9%	16.7%	1	3,542	4,778	34.9%	23.5%
Malaysia	3	166	196	17.8%	9.1%	6	792	832	5.0%	7.0%
Singapore	4	199	177	-11.1%	13.5%	5	785	868	10.5%	7.6%
NZ	5	150	147	-2.4%	-11.7%	3	1,507	1,623	7.7%	3.1%
USA	6	111	125	12.6%	8.2%	4	1,209	1,289	6.6%	2.8%
Ireland	7	124	106	-15.1%	-12.9%	18	395	330	-16.5%	-18.7%
Hong Kong	8	72	88	22.9%	14.6%	7	674	783	16.3%	12.8%
Germany	9	84	77	-8.9%	8.0%	11	591	587	-0.6%	5.3%
Indonesia	10	75	67	-10.1%	-10.3%	15	509	439	-13.8%	-2.8%
Japan	11	62	66	6.9%	9.5%	10	713	676	-5.2%	-5.6%
Korea	12	64	62	-3.7%	-2.9%	8	742	771	3.9%	-5.8%
Taiwan	13	49	58	17.3%	4.8%	12	456	509	11.6%	4.8%
France	14	66	57	-12.9%	-8.4%	13	440	493	12.0%	9.3%
Philippines	15	46	51	10.5%	2.4%	17	311	336	8.1%	12.7%
South Africa	16	45	51	12.5%	-8.2%	25	158	137	-13.4%	-15.3%
India	17	32	51	60.4%	16.0%	9	484	697	44.0%	18.2%
Italy	18	41	43	4.1%	16.2%	19	327	281	-14.1%	4.6%
Scandinavia	19	40	39	-3.4%	-9.6%	16	315	366	16.3%	7.0%
Switzerland	20	26	32	23.3%	19.9%	22	169	200	18.6%	1.9%

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 Jun-14	YE Jun-15	% Change	3 Year AAGR	Rank	YE Jun-14	YE Jun-15	% Change	3 Year AAGR
UK	1	154,000	142,800	-7.3%	0.9%	3	627,100	629,300	0.4%	3.3%
Singapore	2	75,000	83,500	11.3%	18.9%	5	318,500	325,200	2.1%	8.2%
NZ	3	76,100	79,200	4.1%	-1.1%	1	1,115,10	1,153,70	3.5%	3.9%
Malaysia	4	64,400	75,200	16.8%	13.1%	7	277,500	293,400	5.7%	14.1%
USA	5	55,000	57,100	3.8%	6.3%	4	500,200	543,500	8.7%	8.9%
China	6	35,600	41,300	16.0%	14.5%	2	710,200	864,200	21.7%	16.1%
Germany	7	32,200	32,400	0.6%	11.8%	11	173,200	181,200	4.6%	7.2%
Indonesia	8	29,400	27,000	-8.2%	-1.1%	12	133,300	136,900	2.7%	5.8%
Ireland	9	26,000	25,200	-3.1%	1.8%	18	73,500	71,800	-2.3%	-3.1%
Japan	10	21,800	23,500	7.8%	10.3%	6	298,000	297,200	-0.3%	-1.3%
India	11	14,300	20,400	42.7%	23.4%	8	172,600	207,000	19.9%	17.2%
France	12	19,300	18,500	-4.1%	-3.3%	15	109,100	113,100	3.7%	5.2%
Hong Kong	13	17,100	18,300	7.0%	2.8%	10	181,100	186,500	3.0%	9.8%
Canada	14	18,000	17,300	-3.9%	4.0%	13	127,400	134,700	5.7%	6.8%
South Africa	15	19,000	15,900	-16.3%	-5.8%	24	50,300	45,900	-8.7%	-12.4%
Scandinavia	16	13,000	14,600	12.3%	-3.6%	17	93,600	94,800	1.3%	3.4%
Italy	17	11,100	14,000	26.1%	20.1%	20	71,000	69,700	-1.8%	3.6%
Philippines	18	10,500	13,600	29.5%	19.6%	16	80,700	98,600	22.2%	19.8%
Korea	19	11,200	13,000	16.1%	-0.4%	9	183,700	197,200	7.3%	3.4%
Taiwan	20	11,600	12,500	7.8%	1.2%	14	108,800	113,700	4.5%	7.7%



International Visitors to Western Australia Market Overview Cont.

Market Share - Spend Estimates

(Ranked by overall spend estimates, YE June 2015)

Rank	Country of Residence	YE Jun-13	YE Jun-14	YE Jun-15
1	UK	18.7%	17.7%	16.2%
2	China	4.8%	5.1%	4.3%
3	Malaysia	22.6%	21.0%	23.5%
4	Singapore	18.3%	25.4%	20.4%
5	NZ	12.3%	10.0%	9.0%
6	USA	8.7%	9.2%	9.7%
7	Ireland	27.9%	31.5%	32.0%
8	Hong Kong	10.9%	10.6%	11.2%
9	Germany	12.4%	14.3%	13.1%
10	Indonesia	18.0%	14.7%	15.3%

Market Share - Visitor Estimates

(Ranked by overall visitor estimates, YE June 2015)

Rank	Country of Residence	YE Jun-13	YE Jun-14	YE Jun-15
1	UK	23.8%	24.6%	22.7%
2	Singapore	21.3%	23.5%	25.7%
3	NZ	7.6%	6.8%	6.9%
4	Malaysia	26.1%	23.2%	25.6%
5	USA	11.0%	11.0%	10.5%
6	China	4.9%	5.0%	4.8%
7	Germany	16.4%	18.6%	17.9%
8	Indonesia	22.6%	22.1%	19.7%
9	Ireland	31.8%	35.4%	35.1%
10	Japan	6.3%	7.3%	7.9%

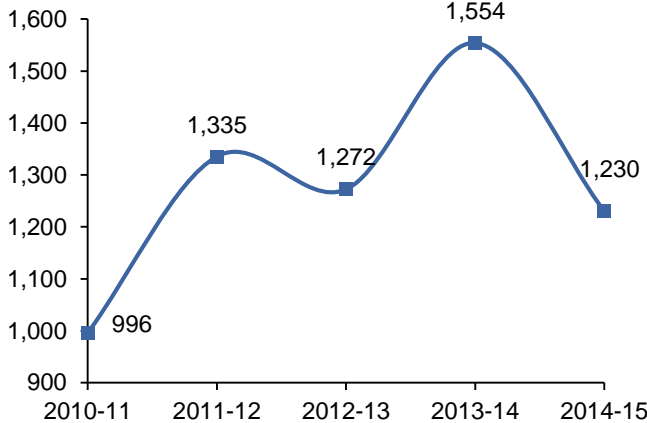
Interstate Visitors to Western Australia Market Overview*

Spend

(-) 20.9%

- \$1,230 million in spend
- \$997 average spend per visitor
- 5.8% of interstate spend in Australia

Estimated Spend (\$m)

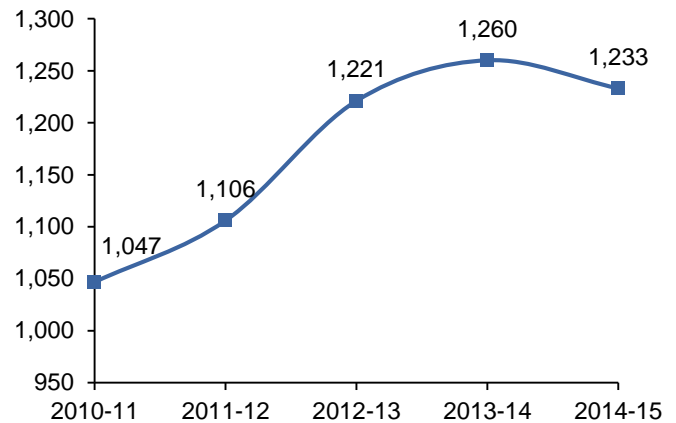


Visitors

(-) 2.1%

- 1.233 million visitors
- 4.6% of interstate visitors in Australia

Estimated Visitors ('000)

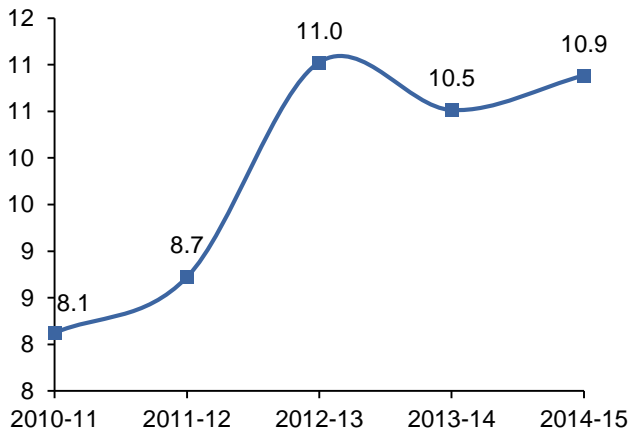


Visitor Nights

(+) 3.5%

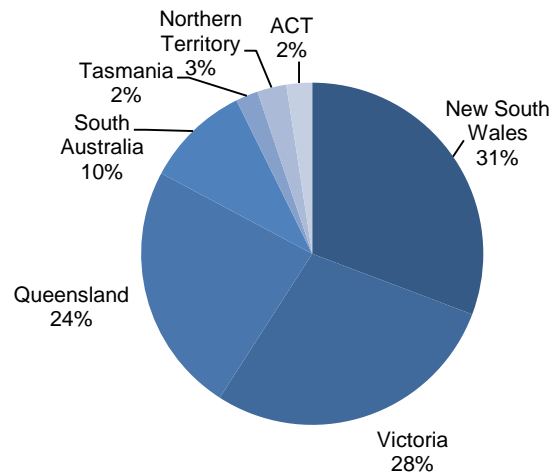
- 10.9 million nights
- 8.8 nights on average
- 8.0% of interstate visitor nights in Australia

Estimated Nights (Million)

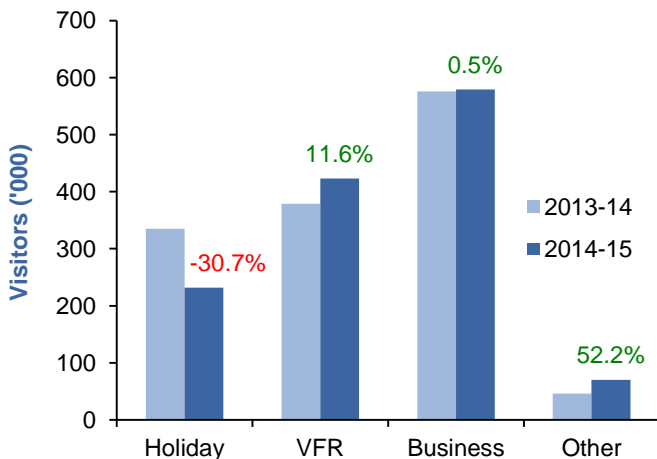


Source Markets

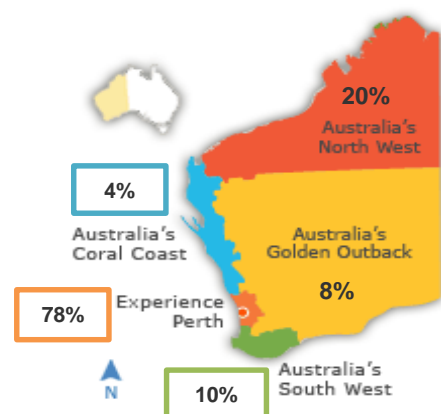
By Visitors



Purpose of Visit



Visitor Dispersal



*Estimates are based on a sample size of 580 and must be considered with the following confidence intervals: Spend $\pm 5.0\%$, Visitors $\pm 9.8\%$, Nights $\pm 9.9\%$

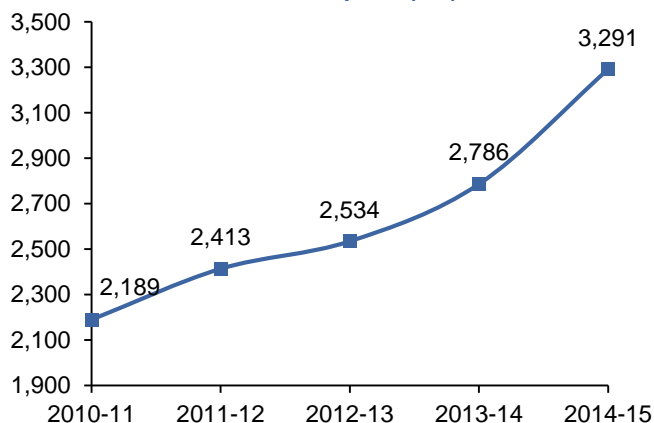
Intrastate Overnight Visitors in Western Australia Market Overview

Spend

(+) 18.1%

- \$3,291 million in spend
- \$492 average spend per visitor
- 14.3% of intrastate overnight spend in Australia

Estimated Spend (\$m)

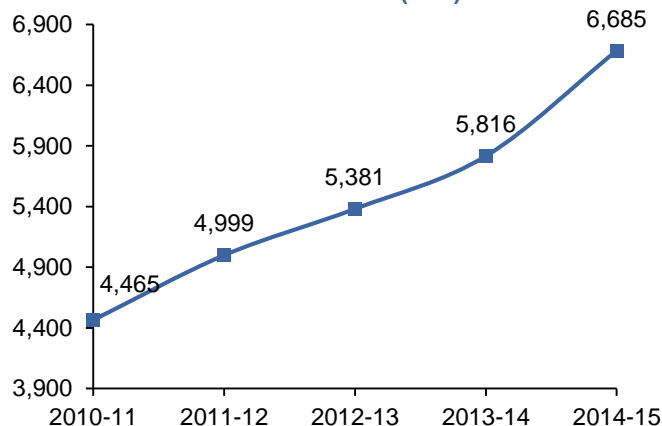


Visitors

(+) 14.9%

- 6.685 million visitors
- 11.6% of intrastate overnight visitors in Australia

Estimated Visitors ('000)

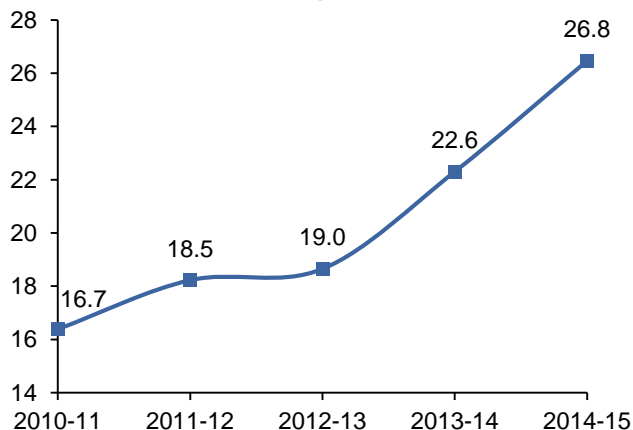


Visitor Nights

(+) 18.4%

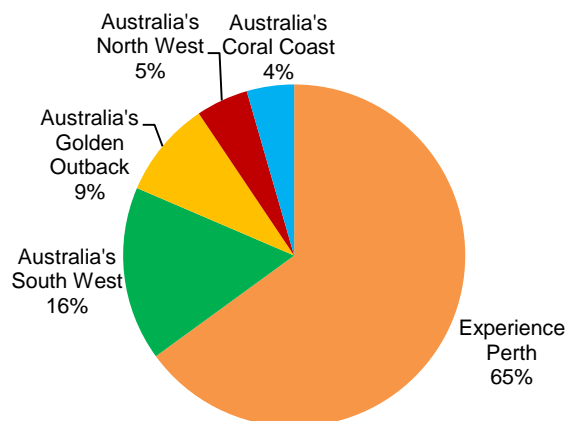
- 26.8 million nights
- 4.0 nights on average
- 15.1% of intrastate visitor nights in Australia

Estimated Nights (Million)

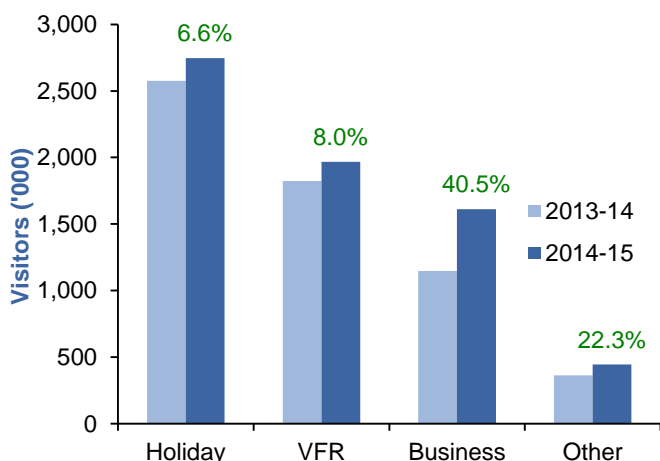


Source Markets

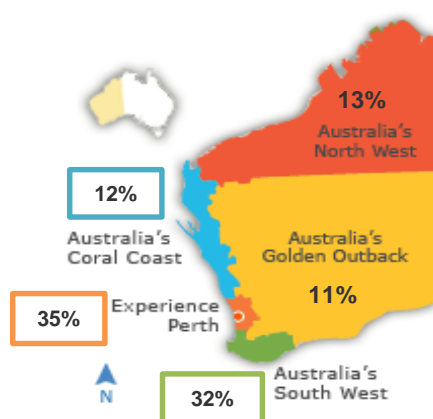
By Visitors



Purpose of Visit



Visitor Dispersal



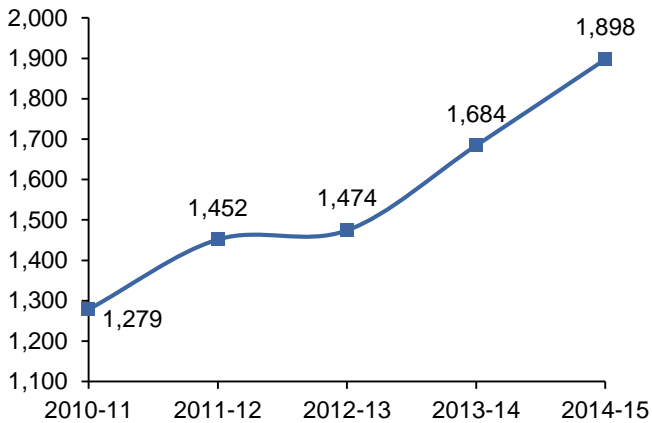
Intrastate Daytrip Visitors in Western Australia Market Overview

Spend

(+) 12.7%

- \$1,898 million in spend
- \$108 average spend per visitor
- 10.4% of intrastate daytrip spend in Australia

Estimated Spend (\$m)

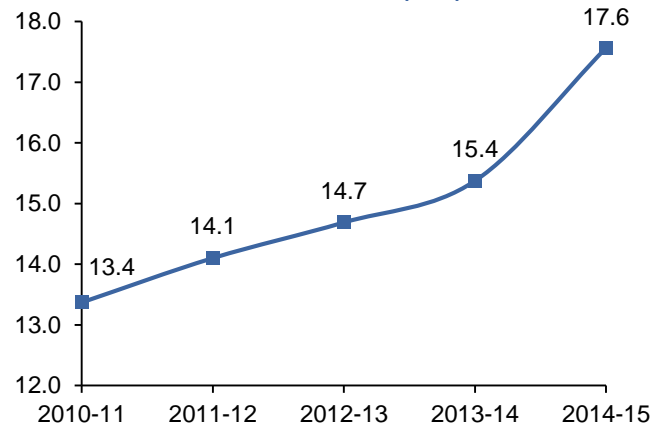


Visitors

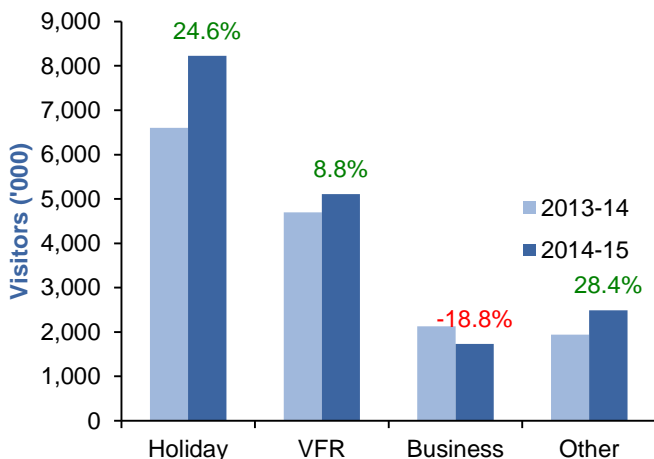
(+) 14.2%

- 17.6 million daytrips
- 11.0% of intrastate daytrip visitors in Australia

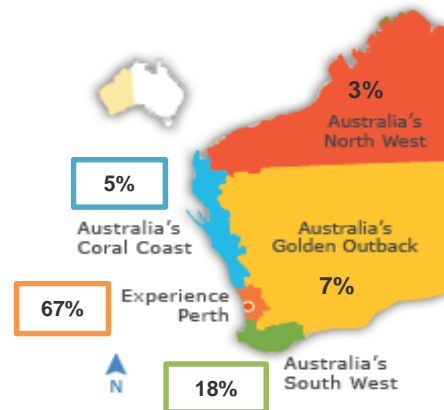
Estimated Visitors ('000)



Purpose of Visit

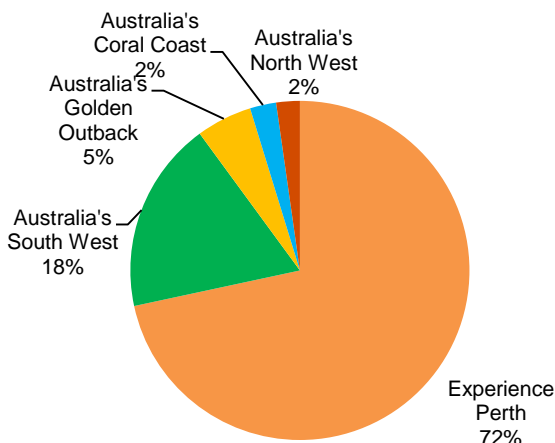


Visitor Dispersal



Source Markets

By Visitors



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

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

research@westernaustralia.com