



Tourism Western Australia

# Fast Facts Year Ending March 2015

Prepared by the Research Team

July 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 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 has introduced mobile phone interviewing as of 2 January 2014, with 50% of the NVS sample interviewed on fixed-lines, and 50% on mobile phones.

Analysis by TRA shows 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 results from year ending (YE) March 2014 and onwards are not directly comparable to results from previous years. Consequently, the domestic results are reported for YE March 2015 only, without making any comparisons to results from previous years.

### Confidence Intervals and Sample Sizes

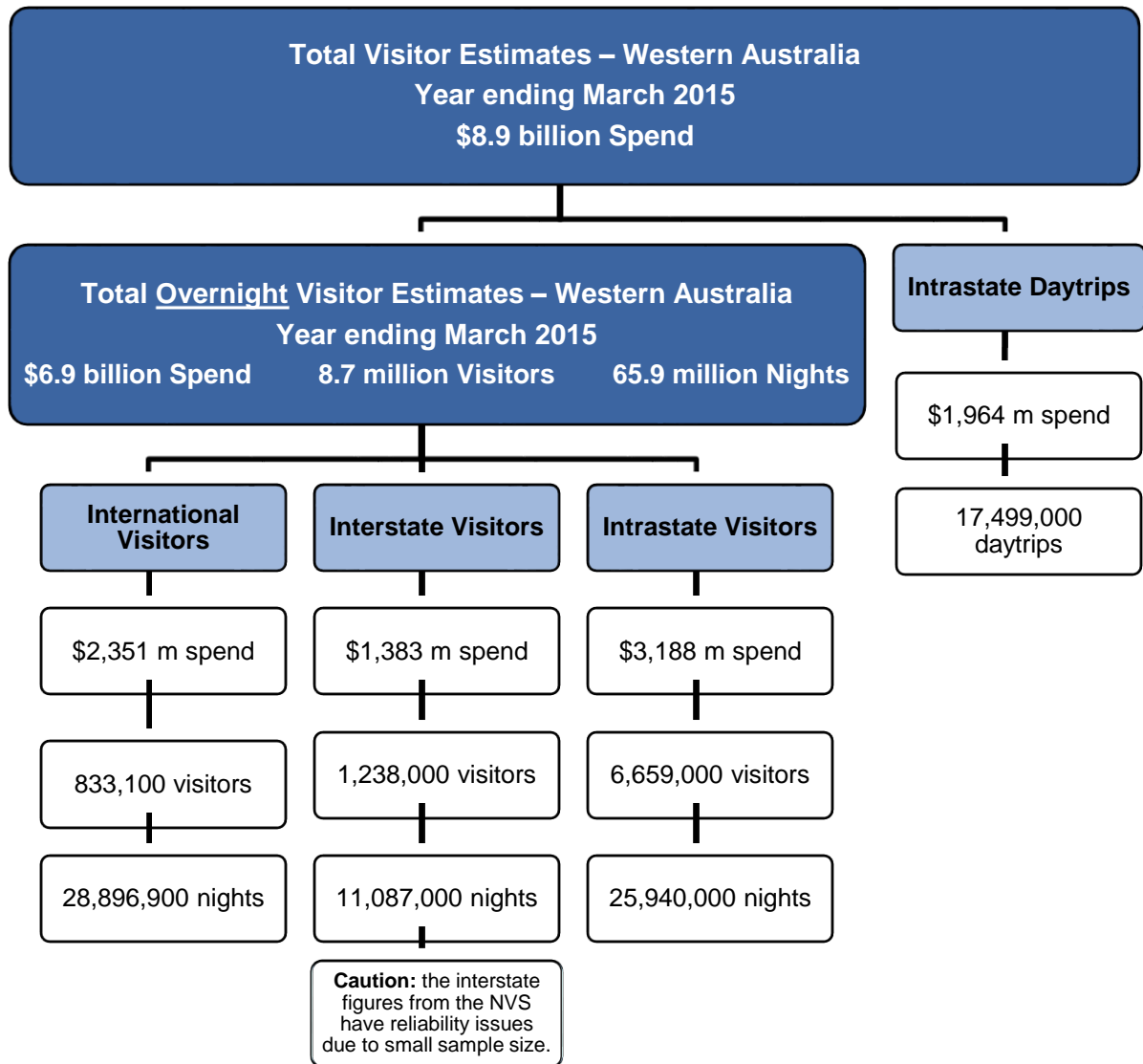
Note that estimates in this document are based on survey data and need to be considered within these Confidence Intervals (CI) for Western Australia YE March 2015 estimates:

- Intrastate CI: Spend  $\pm$  5.2%, Visitors  $\pm$  4.3%, Nights  $\pm$  6.4%
- Interstate CI: Spend  $\pm$  5.2%, Visitors  $\pm$  9.8%, Nights  $\pm$  9.8%
- International CI: Spend  $\pm$  6.1%, Visitors  $\pm$  3.6%, Nights  $\pm$  5.9%
- Intrastate Daytrip CI: Spend  $\pm$  7.0%, Visitors  $\pm$  4.6

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

- Intrastate Visitors: n= 3,142
- Interstate Visitors: n= 588
- Domestic Spend: n= 3,443
- International: Spend n= 5,018, Visitors n= 5,841
- Intrastate Daytrip: Spend n= 2,181, Visitors n= 2,180

## Total Visitors to/within Western Australia Market Overview



## Total Visitors to/within Western Australia Market Overview Cont. Year Ending March 2015

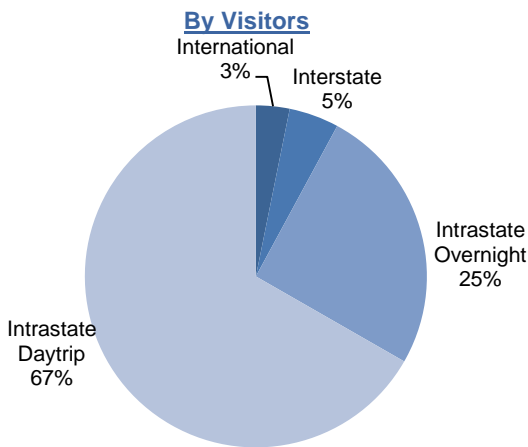
### Key Stats

- \$8,887 million in spend
- 8.7 million overnight visitors
- 17.5 million daytrips
- 65.9 million visitor nights
- 7.6 night average length of stay

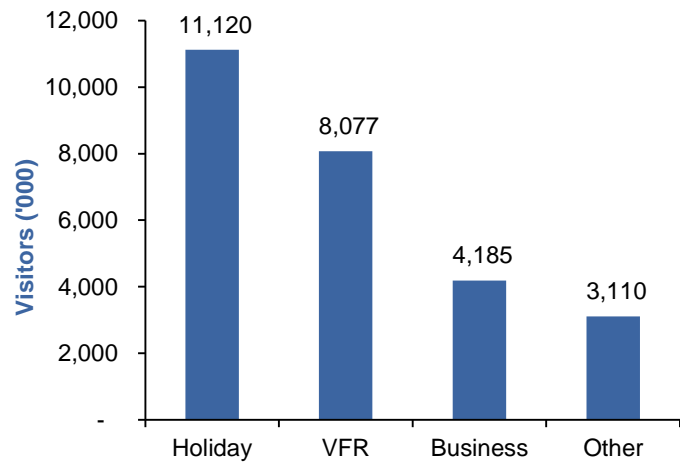
### Market Share

- 10.7% of visitor spend in Australia
- 10.5% of visitors to/in Australia
- 12.1% of visitor nights in Australia

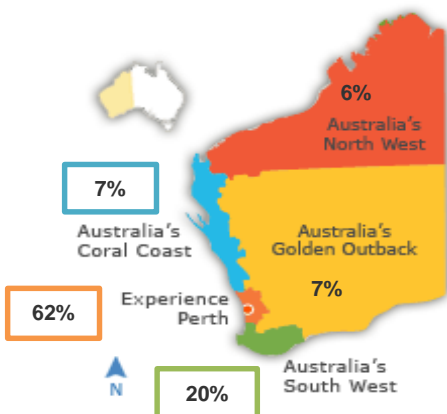
### Source Markets



### Purpose of Visit



### Visitor Dispersal



## Overnight Visitors to Western Australia Market Overview Year Ending March 2015

### Key Stats

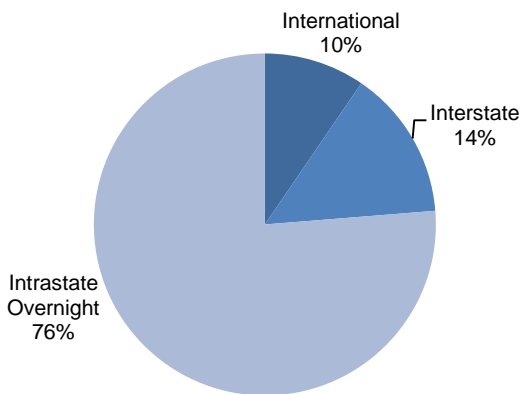
- \$6,923 million in spend
- 8.730 million visitors
- 65.924 million visitor nights
- 7.6 night average length of stay
- \$105 average spend per night
- \$793 average spend per visitor

### Market Share

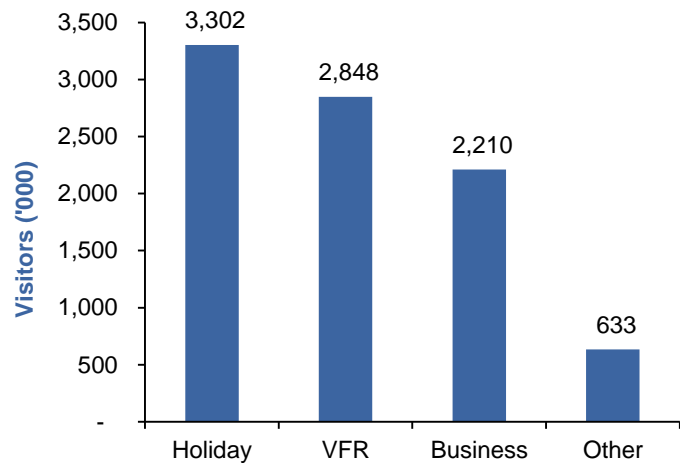
- 10.7% of overnight visitor spend in Australia
- 9.7% of overnight visitors in Australia
- 12.1% of visitor nights in Australia

### Source Markets

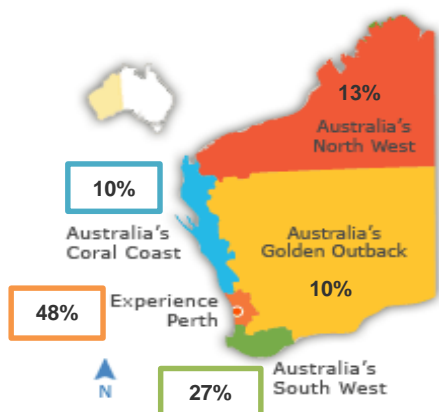
#### By Visitors



### Purpose of Visit



### Visitor Dispersal



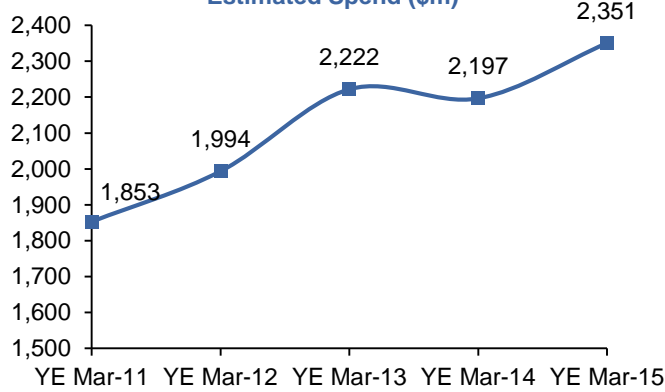
## International Visitors to Western Australia Market Overview

### Spend

(+) 7.0%

- \$2,351 million in spend
- \$2,822 average spend per visitor
- \$81 average spend per night
- 11.5% of international spend in Australia

Estimated Spend (\$m)

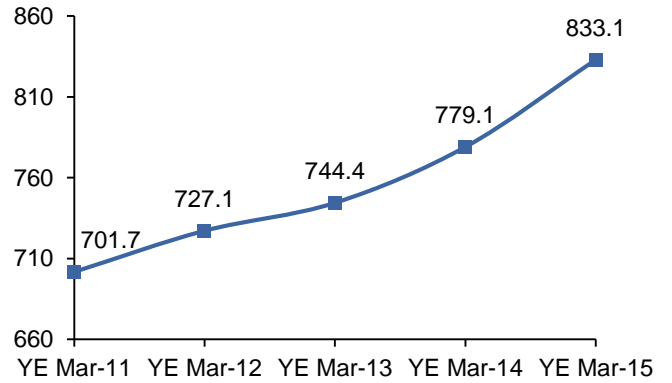


### Visitors

(+) 6.9%

- 833,100 visitors
- 12.8% of international visitors to Australia

Estimated Visitors ('000)

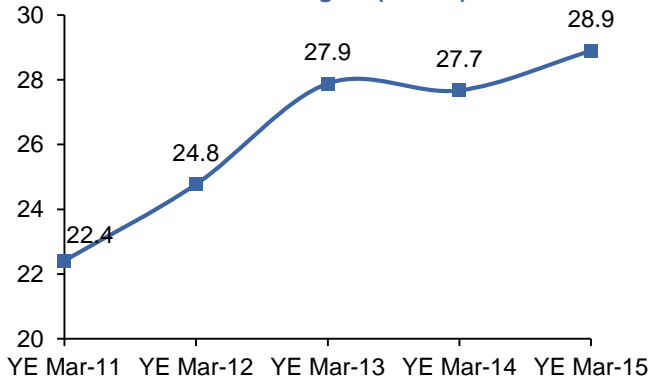


### Visitor Nights

(+) 4.4%

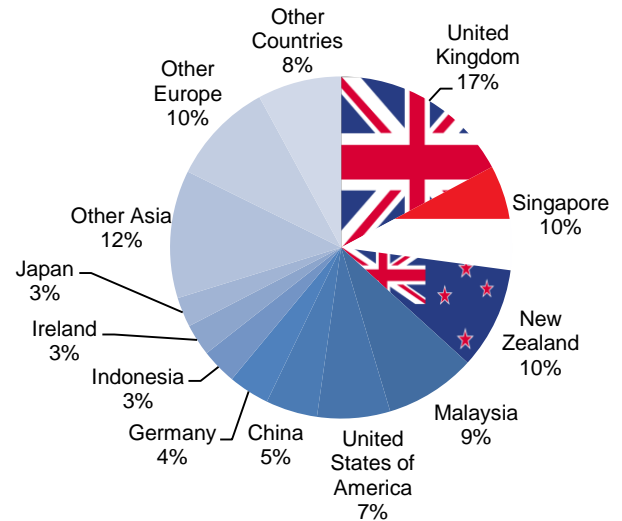
- 28.9 million nights
- 34.7 nights on average
- 12.5% of international visitor nights in Australia

Estimated Nights (Million)

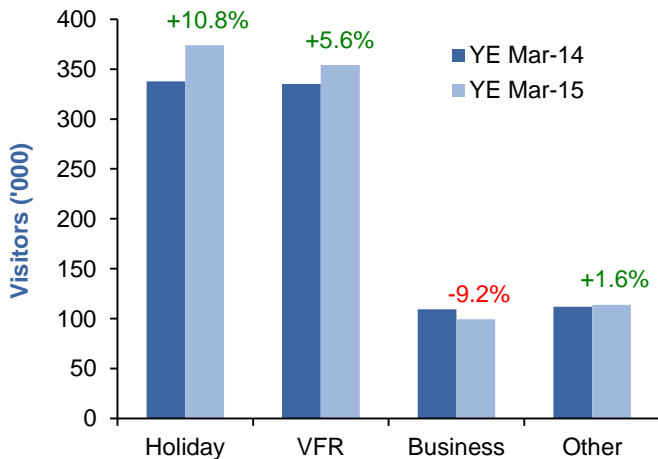


### Source Markets

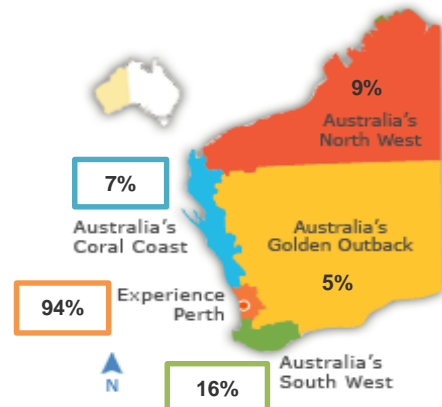
#### By Visitors



### 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 Mar-14	YE Mar-15	% Change	3 Year AAGR	Rank	YE Mar-14	YE Mar-15	% Change	3 Year AAGR
UK	1	334	331	-0.7%	-1.4%	2	1,890	1,923	1.8%	4.0%
China	2	164	215	31.2%	16.3%	1	3,457	4,486	29.8%	20.2%
Malaysia	3	150	191	26.8%	8.0%	6	737	818	11.1%	4.5%
Singapore	4	185	177	-4.1%	9.7%	5	780	838	7.5%	5.2%
NZ	5	159	155	-2.6%	-9.2%	3	1,505	1,607	6.8%	2.5%
USA	6	113	119	5.7%	5.2%	4	1,223	1,255	2.7%	2.5%
Ireland	7	127	110	-13.5%	-12.6%	17	421	329	-21.7%	-20.2%
Hong Kong	8	60	103	71.1%	32.2%	7	630	775	22.9%	15.1%
Germany	9	81	81	0.8%	15.0%	11	580	597	2.9%	6.6%
Indonesia	10	77	68	-12.7%	-9.1%	15	523	436	-16.6%	-2.4%
Japan	11	56	64	13.9%	3.5%	9	703	678	-3.6%	-6.1%
Korea	12	64	62	-2.3%	-3.7%	8	748	763	2.0%	-8.6%
India	13	29	57	97.7%	12.8%	10	470	616	31.0%	8.7%
Taiwan	14	47	56	17.3%	8.6%	12	447	501	12.1%	6.7%
France	15	74	54	-27.1%	-1.8%	13	426	474	11.3%	7.7%
Philippines	16	49	53	8.9%	8.2%	18	319	305	-4.4%	11.1%
South Africa	17	53	53	-0.2%	-2.9%	25	168	135	-20.0%	-16.3%
Italy	18	38	48	26.1%	10.5%	19	308	302	-2.0%	6.2%
Switzerland	19	23	35	52.0%	19.6%	21	169	198	17.0%	1.9%
Scandinavia	20	42	33	-22.4%	-16.3%	16	307	359	17.2%	5.4%

## 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 Mar-14	YE Mar-15	% Change	3 Year AAGR	Rank	YE Mar-14	YE Mar-15	% Change	3 Year AAGR
UK	1	155,300	143,200	-7.8%	1.5%	3	630,700	630,500	0.0%	4.7%
Singapore	2	69,500	82,800	19.1%	18.6%	5	305,200	324,900	6.5%	9.6%
NZ	3	76,000	80,200	5.5%	-0.7%	1	1,092,000	1,142,300	4.6%	2.7%
Malaysia	4	61,900	71,700	15.8%	10.8%	7	259,900	288,600	11.0%	13.1%
USA	5	50,900	57,400	12.8%	4.9%	4	487,800	534,800	9.6%	8.2%
China	6	33,900	40,700	20.1%	13.0%	2	698,500	829,000	18.7%	16.2%
Germany	7	31,600	32,400	2.5%	11.6%	11	170,300	180,900	6.2%	7.6%
Indonesia	8	28,500	28,100	-1.4%	1.3%	12	129,300	138,100	6.8%	6.9%
Ireland	9	25,300	25,000	-1.2%	0.2%	18	75,200	72,400	-3.7%	-2.8%
Japan	10	20,400	23,400	14.7%	6.8%	6	296,600	297,400	0.3%	-2.3%
Hong Kong	11	15,300	19,000	24.2%	5.4%	10	169,100	188,000	11.2%	10.3%
France	12	20,300	18,800	-7.4%	3.6%	15	107,100	113,400	5.9%	6.4%
India	13	14,500	18,000	24.1%	17.7%	8	162,100	201,900	24.6%	17.1%
Canada	14	17,200	17,100	-0.6%	2.1%	13	124,700	133,700	7.2%	5.7%
South Africa	15	19,500	16,300	-16.4%	-7.6%	23	51,100	46,500	-9.0%	-14.1%
Italy	16	11,200	14,600	30.4%	18.5%	19	69,900	70,700	1.1%	5.5%
Philippines	17	9,400	14,200	51.1%	19.2%	17	77,200	91,500	18.5%	17.2%
Scandinavia	18	13,800	13,900	0.7%	-2.4%	16	91,600	96,000	4.8%	4.2%
Korea	19	10,400	13,800	32.7%	3.0%	9	185,600	194,900	5.0%	3.1%
Switzerland	20	11,000	12,300	11.8%	14.4%	22	46,500	50,700	9.0%	6.0%





## International Visitors to Western Australia Market Overview Cont.

### Market Share - Spend Estimates

(Ranked by overall spend estimates, YE March 2015)

Rank	Country of Residence	YE Mar-13	YE Mar-14	YE Mar-15
1	UK	19.2%	17.7%	17.2%
2	China	5.1%	4.7%	4.8%
3	Malaysia	21.8%	20.4%	23.3%
4	Singapore	19.4%	23.7%	21.1%
5	NZ	12.3%	10.6%	9.7%
6	USA	9.0%	9.2%	9.5%
7	Ireland	27.7%	30.1%	33.3%
8	Hong Kong	10.1%	9.6%	13.4%
9	Germany	11.7%	13.9%	13.6%
10	Indonesia	17.9%	14.8%	15.5%

### Market Share - Visitor Estimates

(Ranked by overall visitor estimates, YE March 2015)

Rank	Country of Residence	YE Mar-13	YE Mar-14	YE Mar-15
1	UK	24.2%	24.6%	22.7%
2	Singapore	21.8%	22.8%	25.5%
3	NZ	7.5%	7.0%	7.0%
4	Malaysia	25.9%	23.8%	24.8%
5	USA	11.4%	10.4%	10.7%
6	China	5.2%	4.9%	4.9%
7	Germany	16.6%	18.6%	17.9%
8	Indonesia	22.7%	22.0%	20.3%
9	Ireland	32.5%	33.6%	34.5%
10	Japan	6.6%	6.9%	7.9%

## Interstate Visitors to Western Australia Market Overview Year Ending March 2015

### Key Stats

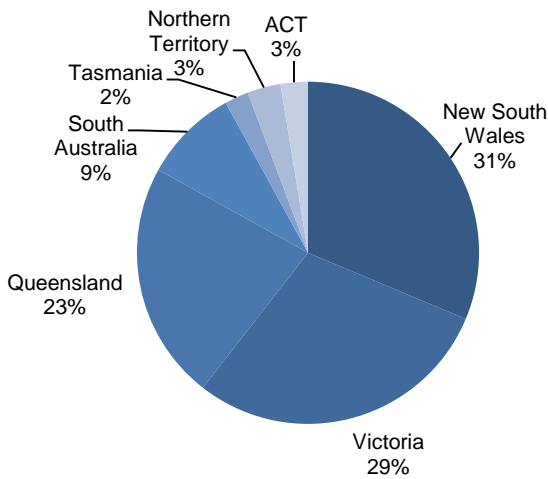
- \$1,383 million in spend
- 1.238 million visitors
- 11.087 million visitor nights
- 9.0 night average length of stay
- \$125 average spend per night
- \$1,118 average spend per visitor

### Market Share

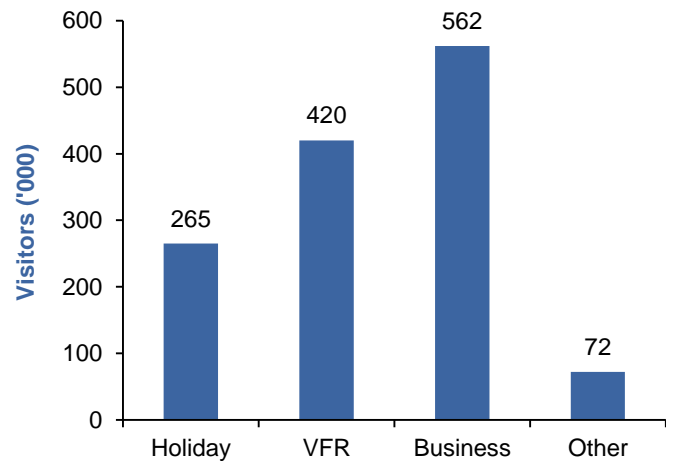
- 6.5% of interstate spend in Australia
- 4.7% of interstate visitors in Australia
- 8.2% of interstate nights in Australia

### Source Markets

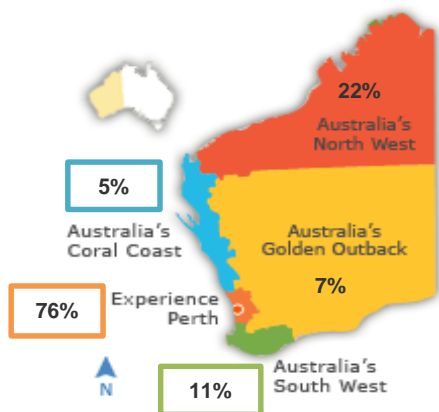
#### By Visitors



### Purpose of Visit



### Visitor Dispersal



# Intrastate Overnight Visitors in Western Australia Market Overview

## Year Ending March 2015

### Key Stats

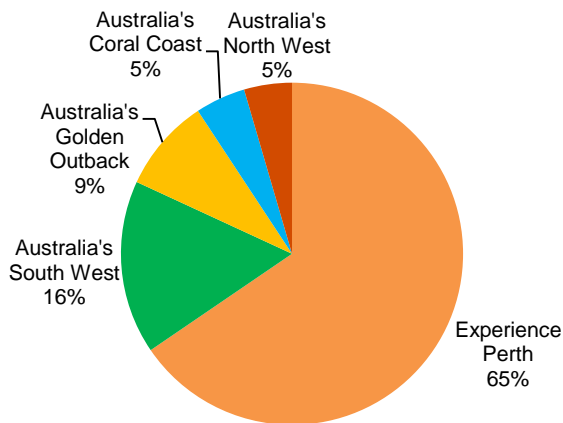
- \$3,188 million in spend
- 6.659 million visitors
- 25.940 million visitor nights
- 3.9 night average length of stay
- \$123 average spend per night
- \$479 average spend per visitor

### Market Share

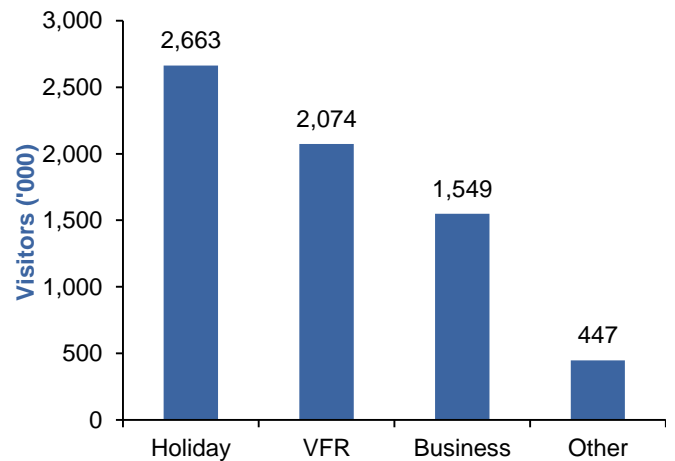
- 14.0% of intrastate spend in Australia
- 11.6% of intrastate visitors in Australia
- 14.7% of intrastate nights in Australia

### Source Markets

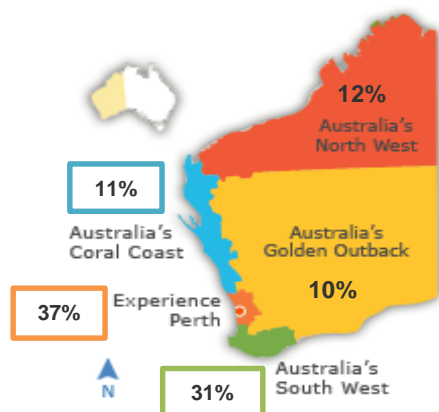
#### By Visitors



### Purpose of Visit



### Visitor Dispersal



# Intrastate Daytrip Visitors in Western Australia Market Overview

## Year Ending March 2015

### Key Stats

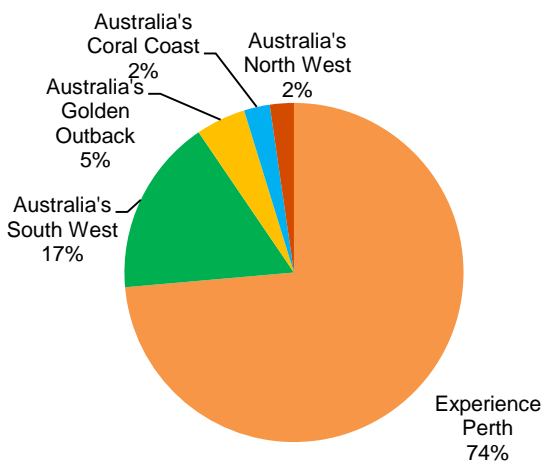
- \$1,964 million in spend
- 17.499 million visitors
- \$112 average spend per visitor

### Market Share

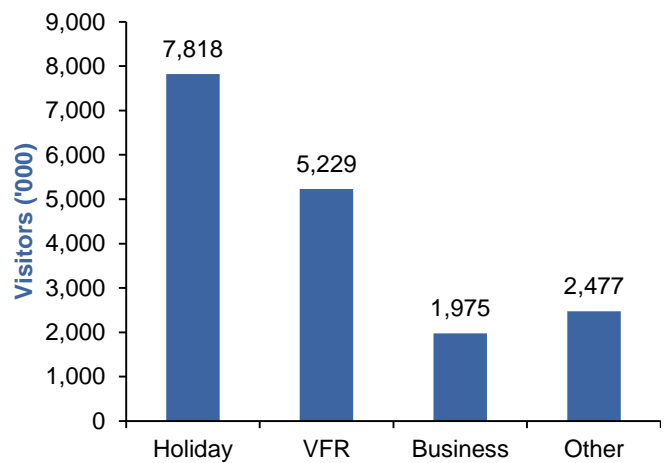
- 10.6% of intrastate daytrip spend in Australia
- 11.0% of intrastate daytrip visitors in Australia

### Source Markets

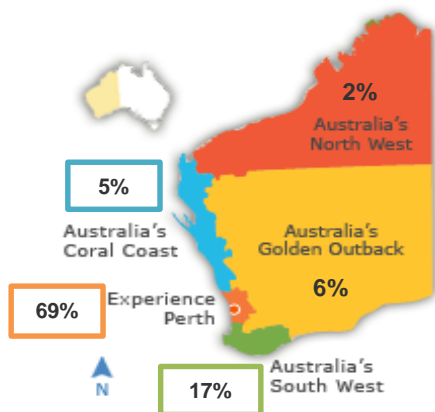
#### By Visitors



### Purpose of Visit



### Visitor Dispersal

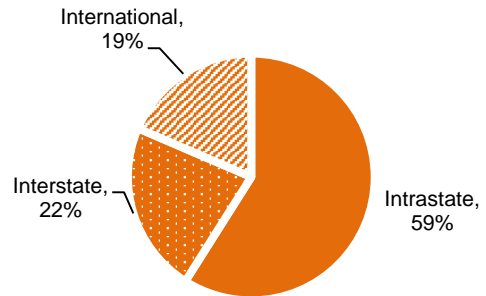


## Overnight Visitation to Western Australia Tourism Regions Year Ending March 2015

### Experience Perth

	Visitors	Nights
Intrastate	2,479,000	6,238,000
Interstate	945,000	5,026,000
International	779,400	23,175,800
<b>Total</b>	<b>4,203,400</b>	<b>34,440,800</b>

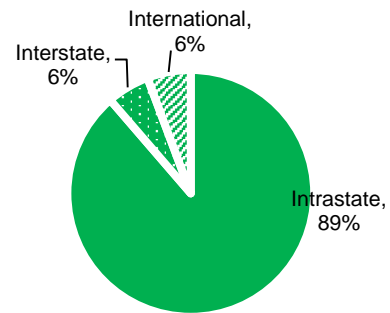
#### Visitors



### Australia's South West

	Visitors	Nights
Intrastate	2,069,000	6,517,000
Interstate	131,000	695,000
International	133,300	1,940,000
<b>Total</b>	<b>2,333,300</b>	<b>9,151,000</b>

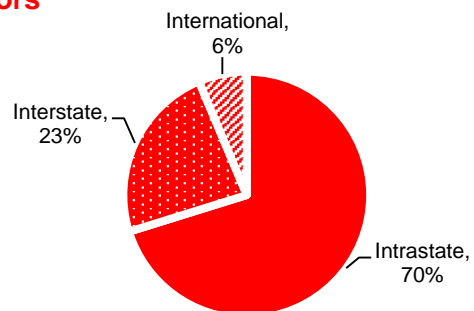
#### Visitors



### Australia's North West

	Visitors	Nights
Intrastate	826,000	6,804,000
Interstate	276,000	3,814,000
International	74,600	2,029,000
<b>Total</b>	<b>1,176,600</b>	<b>12,647,000</b>

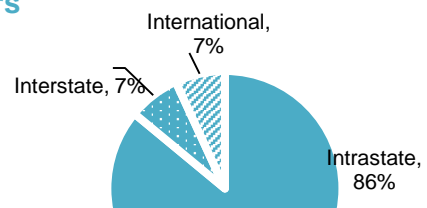
#### Visitors



### Australia's Coral Coast

	Visitors	Nights
Intrastate	735,000	3,293,000
Interstate	61,000	525,000
International	58,700	828,600
<b>Total</b>	<b>854,700</b>	<b>4,646,600</b>

#### Visitors

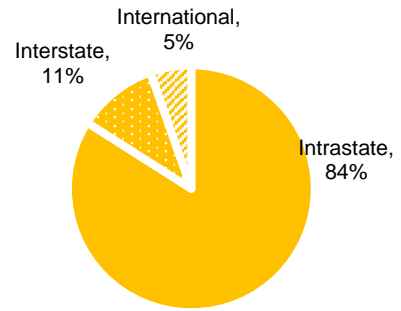


## Overnight Visitation to Western Australia Tourism Regions Cont.

### Australia's Golden Outback

	<b>Visitors</b>	<b>Nights</b>
Intrastate	698,000	3,028,000
Interstate	88,000	665,000
International	44,800	855,600
<b>Total</b>	<b>830,800</b>	<b>4,549,600</b>

### Visitors





## Source and Definitions

### Source:

#### Tourism Research Australia

- Tourism Research Australia is a business unit of Tourism Australia providing research information that supports improved decision making, marketing and tourism industry performance for the Australian community.
  - National Overnight Visitor Survey (NVS): The National Visitor Survey is Australia's primary measure of domestic tourism activity being the major source of information on the characteristics and travel patterns of domestic tourists within Australia. The survey data is collected throughout the year with an annual sample of 120,000 Australian residents over the age of 15 years. Respondents are interviewed on either their landline telephone (50% of sample) or their mobile phone (50% of sample) using Computer Assisted Telephone Interviewing system.
  - 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.
- Domestic Day Trip Definition:
  - Day trips or same day visitors are those who travel for a round trip distance of at least 50km, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded as is routine travel such as commuting between work/school and home. Routine shopping is included as is travel for all purposes, not just pleasure.
- Market Share (Western Australia)
  - Western Australia's market share (percentage) of total visitors from the specified source market in Australia.
- Overnight International Visitors Definition:
  - International visitors aged 15 years and over who spent at least one night in the region.