



Tourism Western Australia

Fast Facts Year Ending March 2016

Prepared by the Research Team

June 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 March 2016 estimates:

- Intrastate CI: Spend \pm 5.0%, Visitors \pm 4.1%, Nights \pm 5.9%
- Interstate CI: Spend \pm 5.0%, Visitors \pm 9.1%, Nights \pm 9.3%
- International CI: Spend \pm 6.3%, Visitors \pm 3.5%, Nights \pm 6.0%
- Intrastate Daytrip CI: Spend \pm 7.0%, Visitors \pm 4.4%

Sample Sizes for Western Australia the YE March 2016 estimates are outlined below:

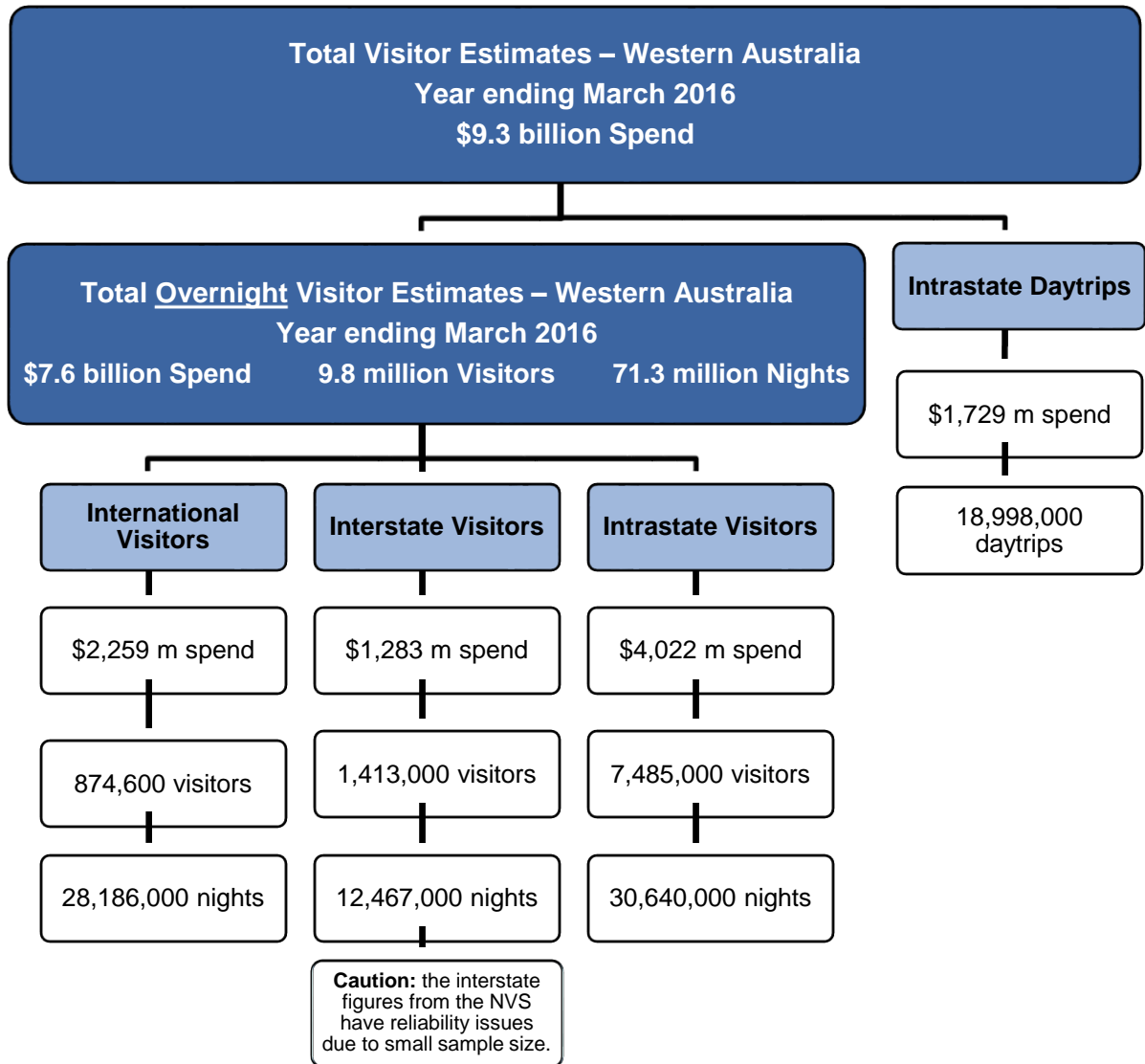
- Intrastate Visitors: n= 3,377
- Interstate Visitors: n= 612
- Domestic Spend: n= 3,674
- International: Spend n= 5,126, Visitors n= 6,001
- Intrastate Daytrip: Spend n= 2,348, Visitors n= 2,345



Total Visitors to/within Western Australia Year Ending March 2016 Summary

- In Year Ending (YE) March 2016, 19 million intrastate daytrips were taken within the State and 9.8 million overnight visitors came to or travelled within WA. Together, these visitors spent \$9.3 billion in the State, \$4.3 billion of which (46%) was spent in Regional WA.
- **International** visitation to WA increased (+) 5.0% in YE March 2016, behind the national average growth rate of (+) 8.9%, while nights and spend decreased (-) 2.5% and (-) 3.9% respectively. The declines in nights and spend were primarily driven by those visiting for working holidays, those travelling for business, and those visiting for employment, which can be linked to WA's changing economy on the back of the mining downturn.
- **Interstate** visitors and nights increased (+14.1% and +12.4% respectively), primarily driven by business visitors, while spend decreased (-7.3%), due to a drop in the average daily spend of interstate visitors. The decline in visitor spend was most significant for holiday visitors, with the data indicating both a decline in leisure visitors and a greater proportion of lower yielding visitors.
- **Intrastate** visitation in WA is continuing to grow, increasing at a rate faster than the national average across each of the key measures; visitors (+12.4%), nights (+18.1%) and spend (+26.2%). Growth in the intrastate market has been driven by both holiday and business travel.

- The number of **daytrips** taken by Western Australians increased (+8.6%) while spend decreased (-3.6%), due to a drop in the average daily spend of visitors, possibly linked to lower consumer confidence amidst a changing economy.



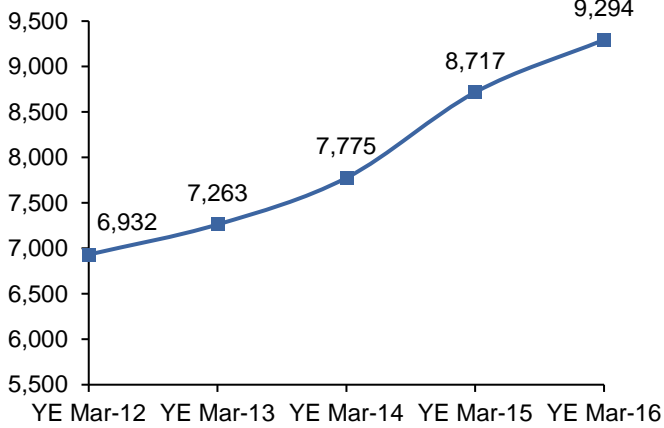
Total Visitors to/within Western Australia Market Overview

Spend

(+) 6.6%

- \$9,294 million in spend
- \$130 average spend per day
- 10.5% of visitor spend in Australia

Estimated Spend (\$m)

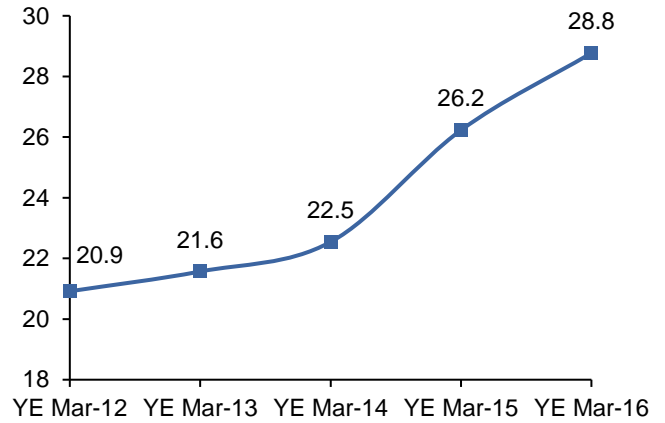


Visitors

(+) 9.7%

- 28.8 million visitors (including both overnight visitors and daytrips)
- 10.6% of visitors to/within Australia

Estimated Visitors (Million)

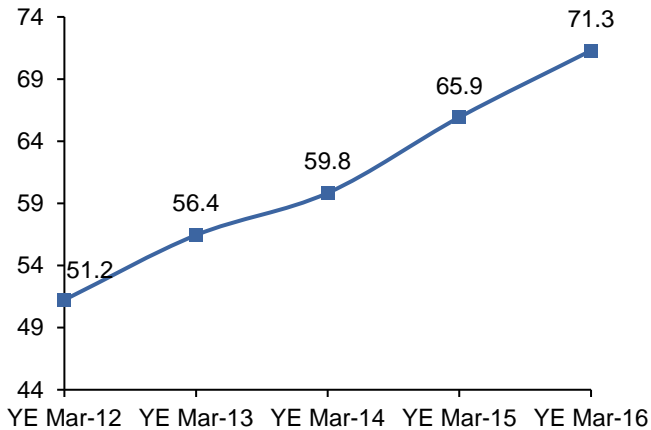


Visitor Nights

(+) 8.1%

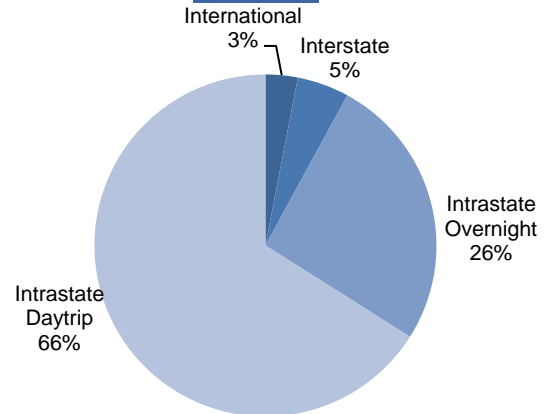
- 71.3 million nights
- 7.3 nights on average (based on overnight visitors only)
- 12.4% of visitor nights in Australia

Estimated Nights (Million)

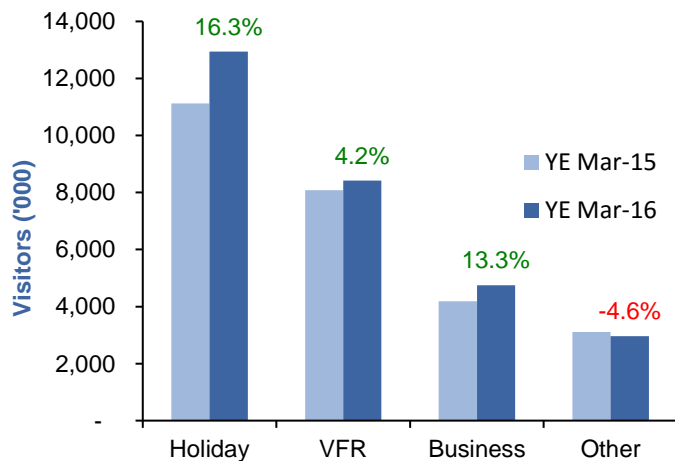


Source Markets

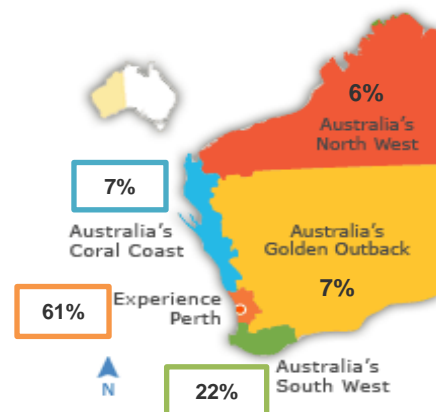
By Visitors



Purpose of Visit



Visitor Dispersal



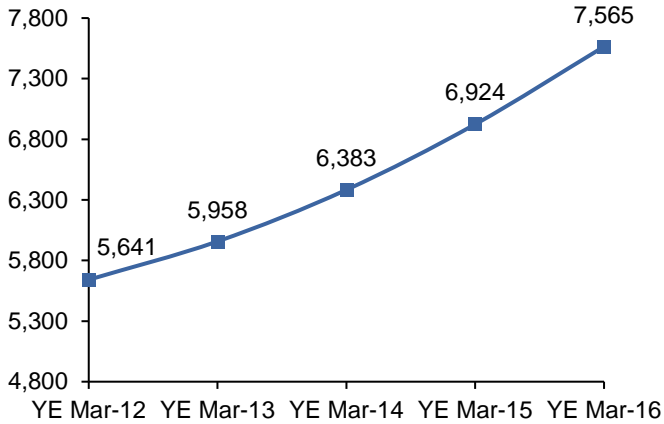
Overnight Visitors to Western Australia Market Overview

Spend

(+) 9.3%

- \$7,565 million in spend
- Average spend per visitor: \$774
- Average spend per night: \$106
- 10.7% of overnight visitor spend in Australia

Estimated Spend (\$m)

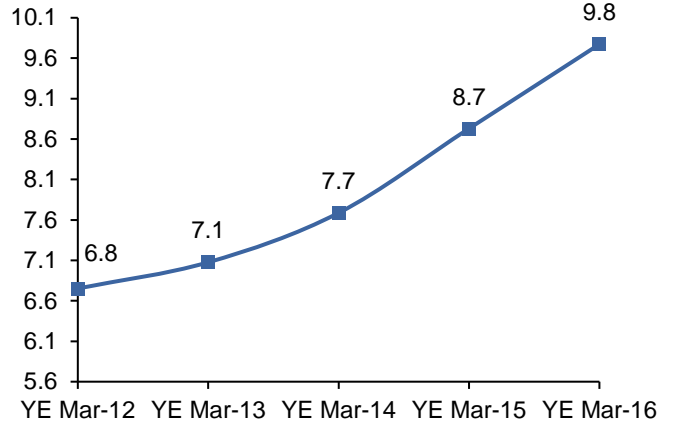


Visitors

(+) 11.9%

- 9.8 million visitors
- 10.1% of overnight visitors in Australia

Estimated Visitors (Million)

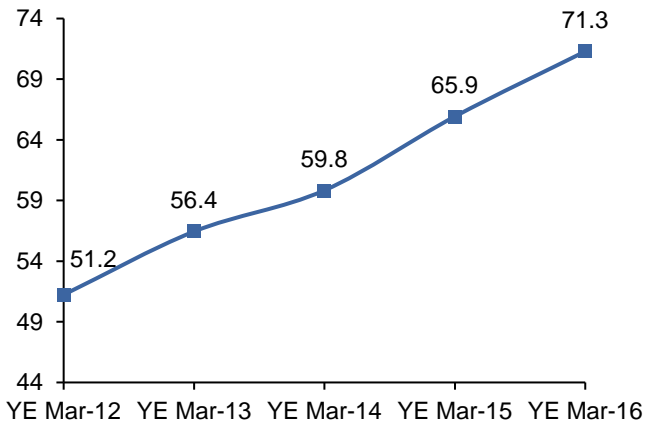


Visitor Nights

(+) 8.1%

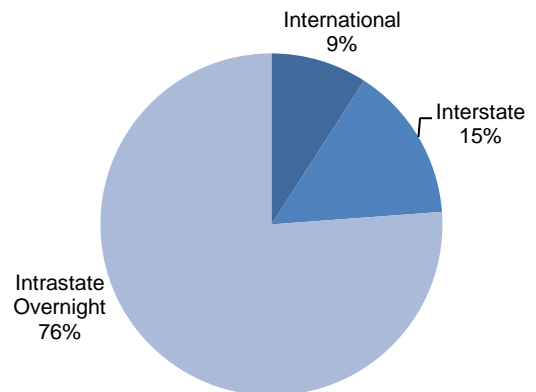
- 71.3 million nights
- 7.3 nights on average
- 12.4% of visitor nights in Australia

Estimated Nights (Million)

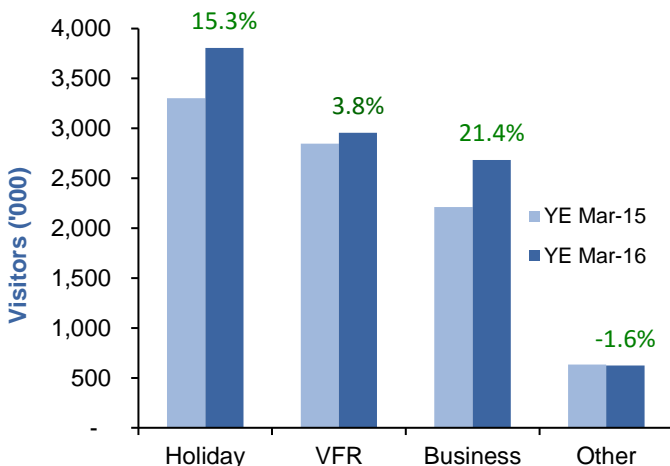


Source Markets

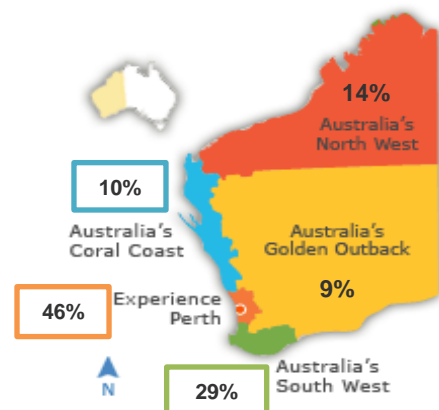
By Visitors



Purpose of Visit



Visitor Dispersal



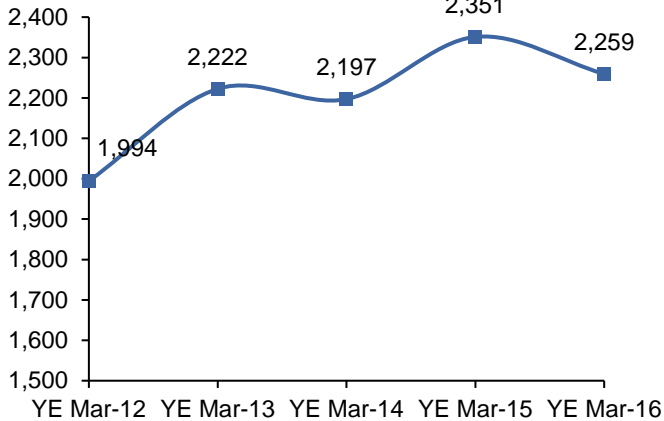
International Visitors to Western Australia Market Overview

Spend

(-) 3.9%

- \$2,259 million in spend
- Average spend per night: \$80
- 9.5% of international spend in Australia

Estimated Spend (\$m)

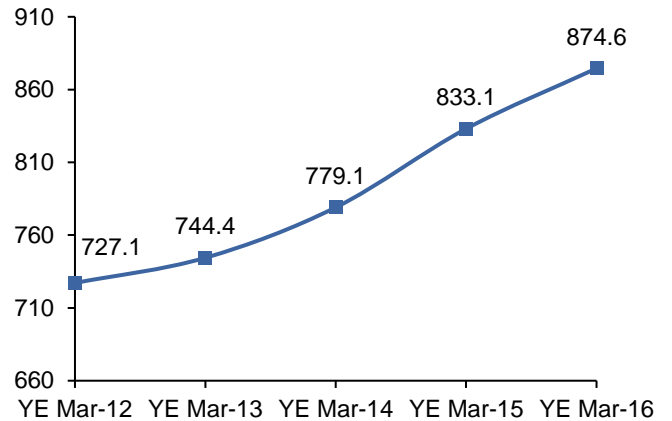


Visitors

(+) 5.0%

- 874,600 visitors
- 12.4% of international visitors to Australia

Estimated Visitors ('000)

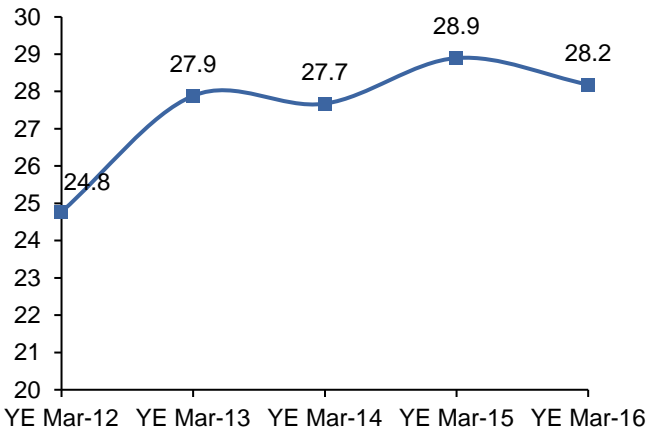


Visitor Nights

(-) 2.5%

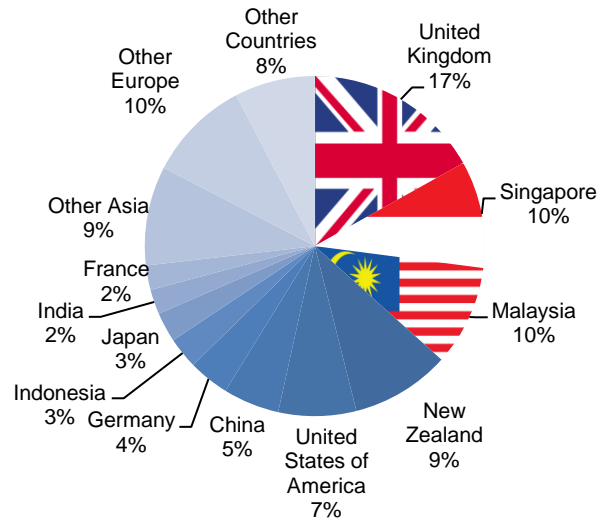
- 28.2 million nights
- 32.2 nights on average
- 11.3% of international visitor nights in Australia

Estimated Nights (Million)

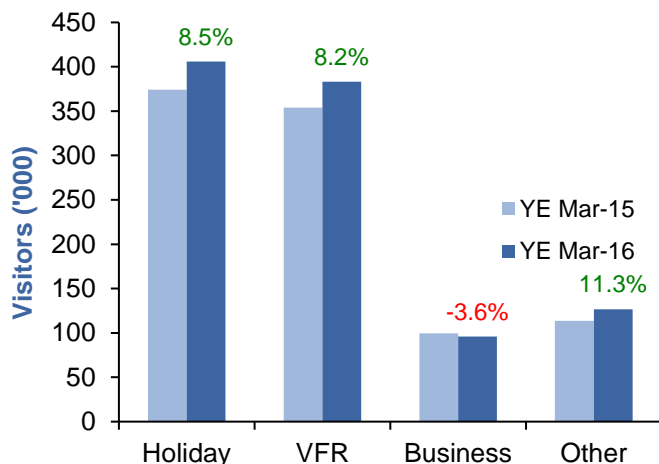


Source Markets

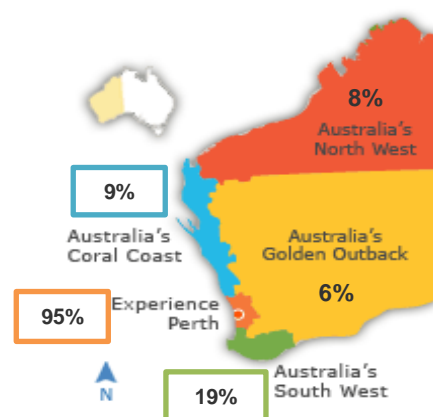
By Visitors



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 Mar-15	YE Mar-16	% Change	3 Year AAGR	Rank	YE Mar-15	YE Mar-16	% Change	3 Year AAGR	
UK	1	331	318	-3.9%	-2.3%	2	1,923	2,052	6.7%	4.2%	
China	2	215	239	11.2%	20.8%	1	4,486	6,049	34.8%	32.3%	
Singapore	3	177	200	12.7%	3.9%	5	838	1,048	25.0%	15.9%	
Malaysia	4	191	194	2.1%	13.8%	6	818	927	13.3%	12.2%	
USA	5	119	140	17.5%	11.5%	4	1,255	1,562	24.5%	13.0%	
NZ	6	155	128	-17.4%	-10.3%	3	1,607	1,686	5.0%	5.9%	
Germany	7	81	82	1.3%	1.0%	11	597	686	14.9%	8.7%	
France	8	54	76	39.9%	1.0%	15	474	448	-5.6%	2.5%	
Hong Kong	9	103	69	-33.6%	6.6%	8	775	869	12.1%	17.4%	
Taiwan	10	56	68	21.7%	19.5%	12	501	586	16.8%	14.4%	
Japan	11	64	61	-4.8%	4.2%	10	678	746	10.1%	3.0%	
Ireland	12	89	61	-31.7%	-22.1%	21	266	221	-16.7%	-18.2%	
Indonesia	13	68	54	-19.5%	-16.2%	14	436	500	14.6%	-2.2%	
Korea	14	62	54	-13.0%	-7.8%	7	763	921	20.7%	10.9%	
Canada	15	29	51	77.4%	5.7%	13	443	514	15.9%	11.5%	
South Africa	16	60	42	-30.8%	-9.9%	24	153	138	-9.8%	-7.9%	
India	17	57	42	-27.5%	19.7%	9	616	755	22.6%	26.7%	
Italy	18	48	37	-22.6%	-1.2%	18	302	289	-4.2%	-3.1%	
Philippines	19	43	37	-13.1%	-4.5%	17	245	333	36.0%	11.9%	
Scandinavia	20	33	37	12.4%	-6.6%	16	359	378	5.3%	11.1%	
Switzerland	21	35	29	-16.3%	12.8%	22	198	209	5.8%	11.3%	

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-15	YE Mar-16	% Change	3 Year AAGR	Rank	YE Mar-15	YE Mar-16	% Change	3 Year AAGR
UK	1	143,200	147,600	3.1%	-2.5%	3	630,500	663,100	5.2%	2.5%
Singapore	2	82,800	89,100	7.6%	13.2%	5	324,900	355,200	9.3%	7.9%
Malaysia	3	71,700	83,700	16.7%	16.3%	7	288,600	314,100	8.8%	9.9%
NZ	4	80,200	82,500	2.9%	4.2%	1	1,142,300	1,196,600	4.8%	4.7%
USA	5	57,400	64,700	12.7%	12.7%	4	534,800	598,200	11.9%	10.7%
China	6	40,700	46,700	14.7%	17.4%	2	829,000	1,017,900	22.8%	20.7%
Germany	7	32,400	34,000	4.9%	3.7%	11	180,900	186,700	3.2%	4.7%
Indonesia	8	28,100	26,100	-7.1%	-4.3%	12	138,100	135,200	-2.1%	2.3%
Japan	9	23,400	24,800	6.0%	10.3%	6	297,400	332,100	11.7%	5.8%
India	10	18,000	20,600	14.4%	19.2%	9	201,900	218,000	8.0%	16.0%
South Africa	11	18,500	20,500	10.8%	4.4%	22	52,700	52,800	0.2%	3.4%
France	12	18,800	20,300	8.0%	0.0%	15	113,400	115,300	1.7%	3.8%
Hong Kong	13	19,000	19,900	4.7%	14.0%	10	188,000	215,900	14.8%	13.0%
Ireland	14	20,200	17,300	-14.4%	-6.8%	21	58,600	54,300	-7.3%	-4.2%
Canada	15	17,100	16,800	-1.8%	-1.2%	13	133,700	134,700	0.7%	3.9%
Scandinavia	16	13,900	14,800	6.5%	3.6%	16	96,000	98,500	2.6%	3.7%
Korea	17	13,800	14,200	2.9%	16.8%	8	194,900	227,100	16.5%	10.6%
Switzerland	18	12,300	12,900	4.9%	8.3%	23	50,700	51,100	0.8%	4.8%
Taiwan	19	11,400	11,800	3.5%	-1.2%	14	113,600	131,400	15.7%	12.3%
Italy	20	14,600	11,400	-21.9%	0.9%	19	70,700	69,800	-1.3%	-0.1%



International Visitors to Western Australia Market Overview Cont.

Market Share - Spend Estimates

(Ranked by overall spend estimates, YE March 2016)

Rank	Country of Residence	YE Mar-14	YE Mar-15	YE Mar-16
1	UK	17.7%	17.2%	15.5%
2	China	4.7%	4.8%	4.0%
3	Singapore	23.7%	21.1%	19.0%
4	Malaysia	20.4%	23.3%	21.0%
5	USA	9.2%	9.5%	9.0%
6	NZ	10.6%	9.7%	7.6%
7	Germany	13.9%	13.6%	12.0%
8	France	17.4%	11.4%	16.9%
9	Hong Kong	9.6%	13.4%	7.9%
10	Taiwan	10.6%	11.1%	11.6%

Market Share - Visitor Estimates

(Ranked by overall visitor estimates, YE March 2016)

Rank	Country of Residence	YE Mar-14	YE Mar-15	YE Mar-16
1	UK	24.6%	22.7%	22.3%
2	Singapore	22.8%	25.5%	25.1%
3	Malaysia	23.8%	24.8%	26.6%
4	NZ	7.0%	7.0%	6.9%
5	USA	10.4%	10.7%	10.8%
6	China	4.9%	4.9%	4.6%
7	Germany	18.6%	17.9%	18.2%
8	Indonesia	22.0%	20.3%	19.3%
9	Japan	6.9%	7.9%	7.5%
10	India	8.9%	8.9%	9.4%

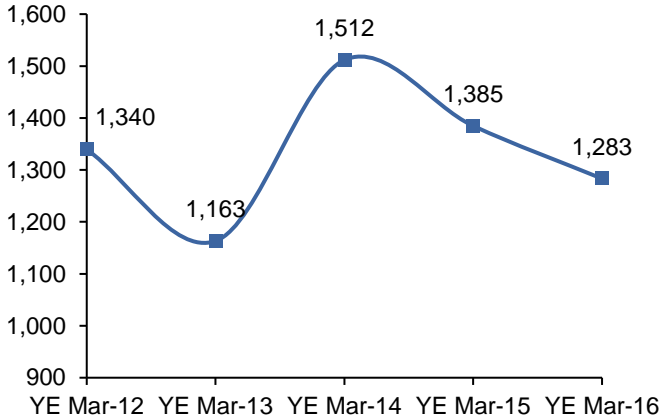
Interstate Visitors to Western Australia Market Overview*

Spend

(-) 7.3%

- \$1,283 million in spend
- \$103 average spend per night
- 5.8% of interstate spend in Australia

Estimated Spend (\$m)

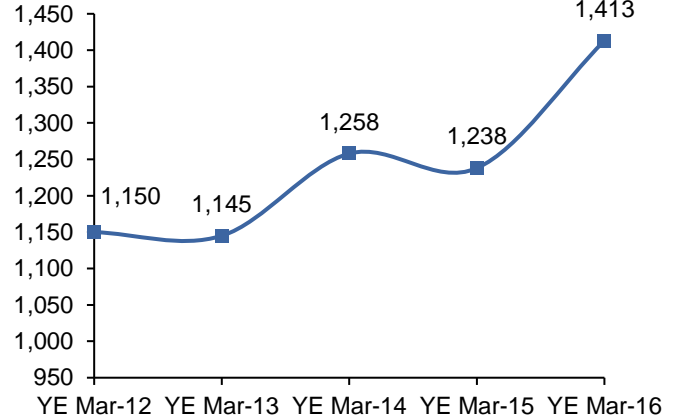


Visitors

(+) 14.1%

- 1.413 million visitors
- 4.9% of interstate visitors in Australia

Estimated Visitors ('000)

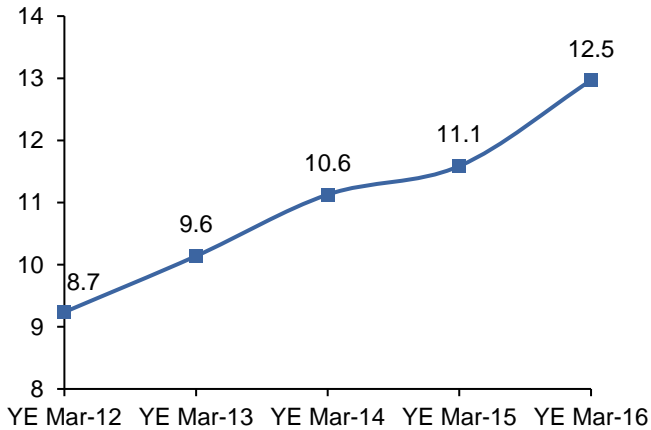


Visitor Nights

(+) 12.4%

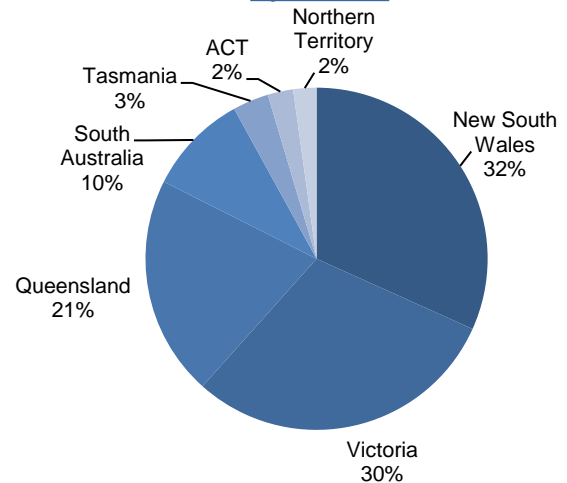
- 12.5 million nights
- 8.8 nights on average
- 8.8% of interstate visitor nights in Australia

Estimated Nights (Million)

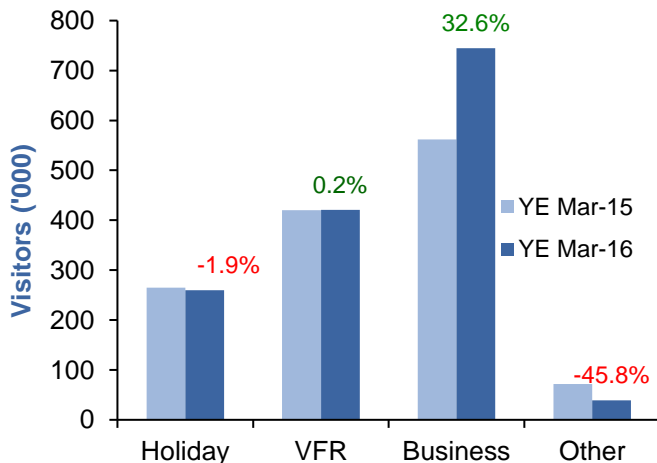


Source Markets

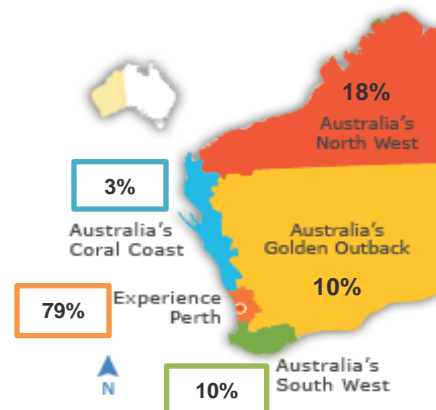
By Visitors



Purpose of Visit



Visitor Dispersal



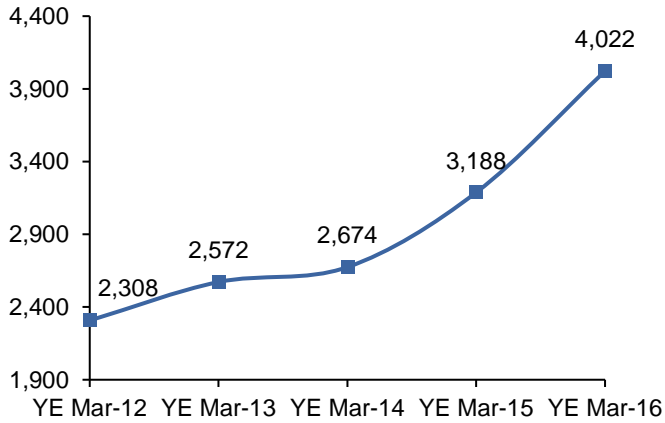
*Estimates are based on a sample size of 612 and must be considered with the following confidence intervals: Spend \pm 5.0%, Visitors \pm 9.1%, Nights \pm 2.1%

Intrastate Overnight Visitors in Western Australia Market Overview

Spend (+) 26.2%

- \$4,022 million in spend
- \$131 average spend per night

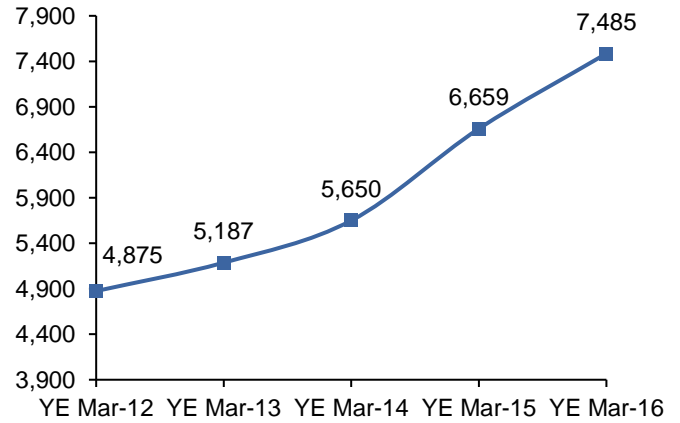
Estimated Spend (\$m)



Visitors (+) 12.4%

- 7.485 million visitors

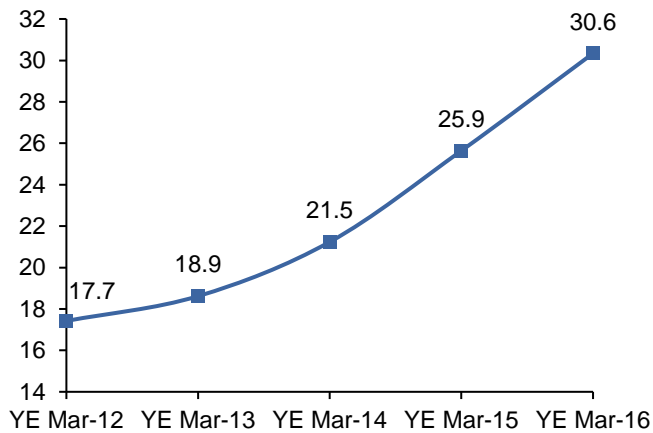
Estimated Visitors ('000)



Visitor Nights (+) 18.1%

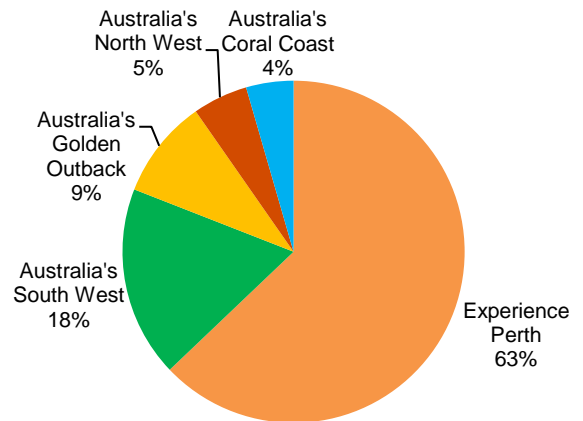
- 30.6 million nights
- 4.1 nights on average

Estimated Nights (Million)

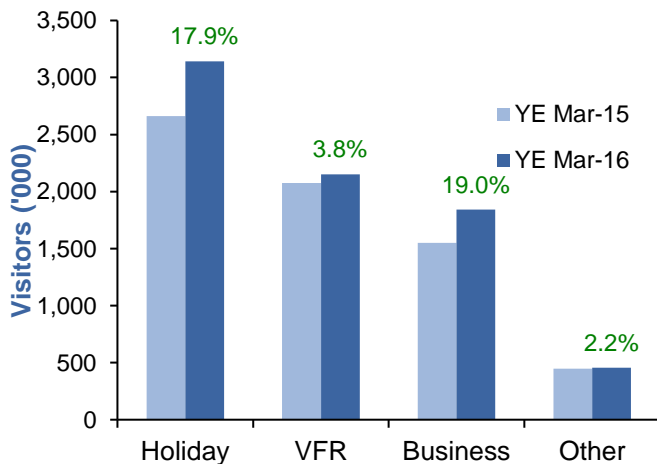


Source Markets

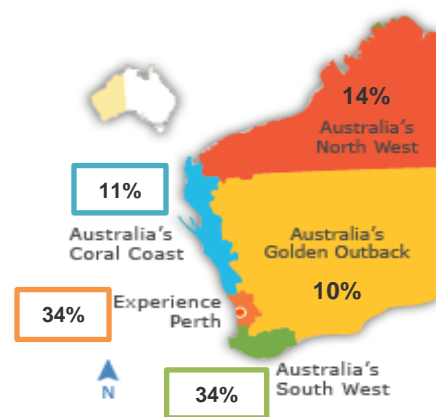
By Visitors



Purpose of Visit



Visitor Dispersal



Intrastate Daytrip Visitors in Western Australia Market Overview

Spend

(-) 3.6%

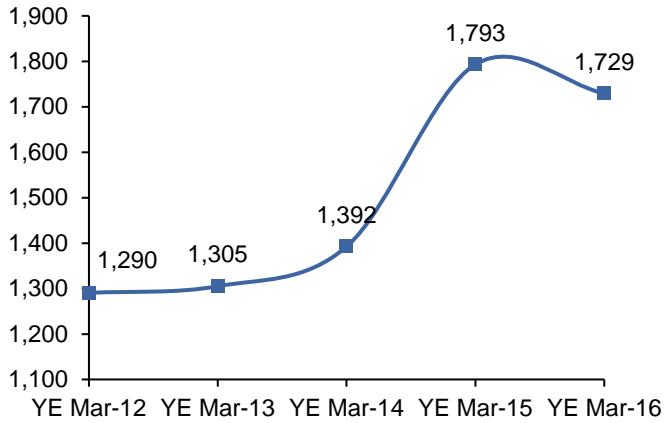
- \$1,729 million in spend
- \$91 average spend per visitor

Visitors

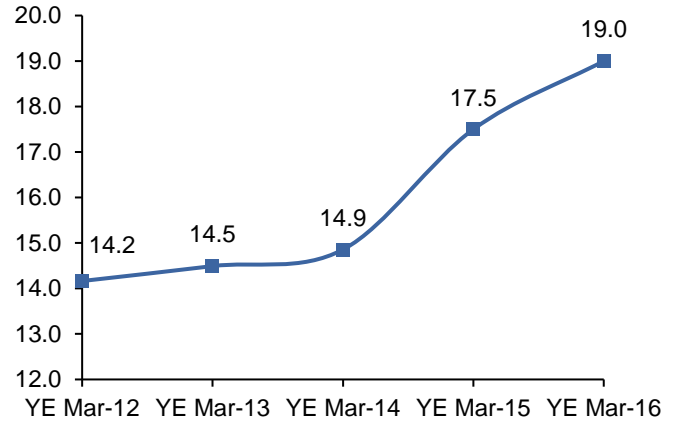
(+) 8.6%

- 19.0 million daytrips

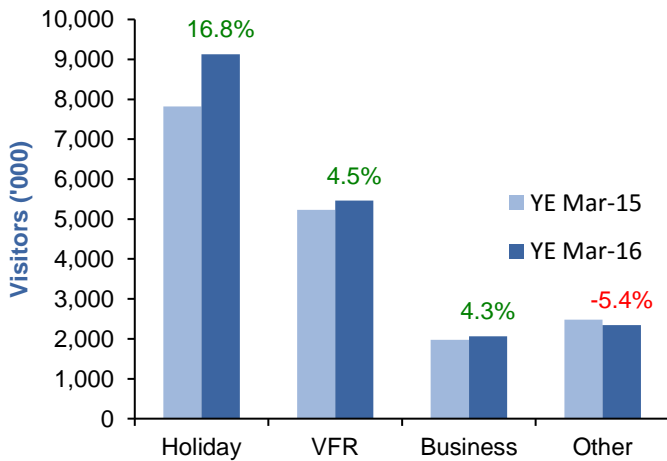
Estimated Spend (\$m)



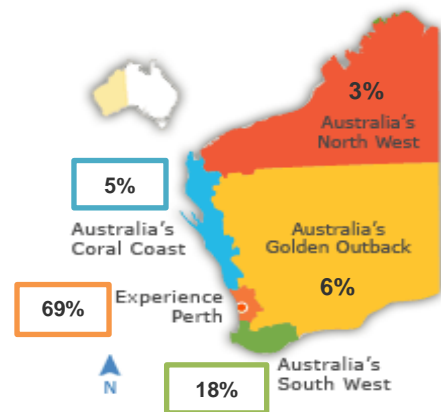
Estimated Visitors ('000)



Purpose of Visit

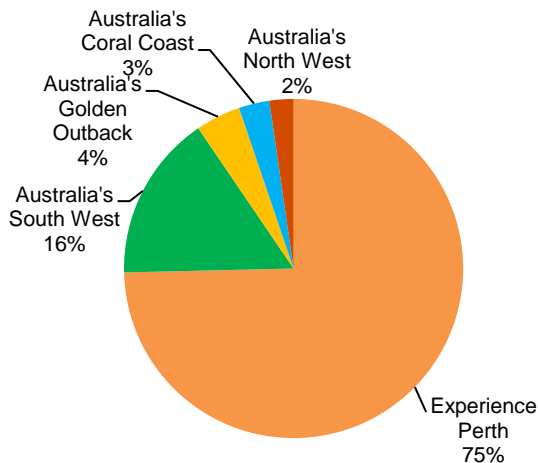


Visitor Dispersal



Source Markets

By Visitors



Overnight Visitation by Tourism Region

Australia's Coral Coast

	YE Mar-15	YE Mar-16	% Change YE Mar-16 – YE Mar-15
Total			
Spend	582	574	-1.4%
Visitors	854,700	965,200	12.9%
Nights	4,646,600	5,104,200	9.8%
Domestic Total			
Visitors	796,000	889,000	11.7%
Nights	3,818,000	4,132,000	8.2%
International			
Visitors	58,700	76,200	29.8%
Nights	828,600	972,200	17.3%

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 ± 11.5%, Nights ± 16.0%;

International CI: Visitors ± 11.3%, Nights ± 27.3%.

Australia's Golden Outback

	YE Mar-15	YE Mar-16	% Change YE Mar-16 – YE Mar-15
Total			
Spend	376	418	11.1%
Visitors	830,800	926,600	11.5%
Nights	4,549,600	4,984,600	9.6%
Domestic Total			
Visitors	786,000	876,000	11.5%
Nights	3,694,000	4,201,000	13.7%
Intrastate			
Visitors	698,000	739,000	5.9%
Nights	3,028,000	3,143,000	3.8%
Interstate			
Visitors	88,000	137,000	55.7%
Nights	665,000	1,058,000	59.1%
International			
Visitors	44,800	50,600	12.9%
Nights	855,600	783,600	-8.4%

Domestic CI: Visitors ± 11.6%, Nights ± 15.9%;

Intrastate CI: Visitors ± 12.6%, Nights ± 18.3%;

Interstate CI: Visitors ± 28.9%, Nights ± 31.5%;

International CI: Visitors ± 13.7%, Nights ± 30.0%.

Overnight Visitation by Tourism Region Cont.

Australia's North West

	YE Mar-15	YE Mar-16	% Change YE Mar-16 – YE Mar-15
Total			
Spend	933	1,109	18.8%
Visitors	1,176,600	1,342,400	14.1%
Nights	12,647,000	13,132,700	3.8%
Domestic Total			
Visitors	1,102,000	1,270,000	15.2%
Nights	10,618,000	11,234,000	5.8%
Intrastate			
Visitors	826,000	1,011,000	22.4%
Nights	6,804,000	7,622,000	12.0%
Interstate			
Visitors	276,000	259,000	-6.2%
Nights	3,814,000	3,611,000	-5.3%
International			
Visitors	74,600	72,400	-2.9%
Nights	2,029,000	1,898,700	-6.4%

Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 9.6%, Nights ± 9.7%;

Intrastate CI: Visitors ± 10.8%, Nights ± 11.8%;

Interstate CI: Visitors ± 21.1%, Nights ± 17.1%;

International CI: Visitors ± 11.6%, Nights ± 20.2%.

Overnight Visitation by Tourism Region Cont.

Australia's South West

	YE Mar-15	YE Mar-16	% Change YE Mar-16 – YE Mar-15
Total			
Spend	1,207	1,530	26.7%
Visitors	2,333,300	2,856,700	22.4%
Nights	9,151,000	11,612,500	26.9%
Domestic Total			
Visitors	2,200,000	2,689,000	22.2%
Nights	7,211,000	9,115,000	26.4%
Intrastate			
Visitors	2,069,000	2,546,000	23.1%
Nights	6,517,000	8,466,000	29.9%
Interstate			
Visitors	131,000	143,000	9.2%
Nights	695,000	649,000	-6.6%
International			
Visitors	133,300	167,700	25.8%
Nights	1,940,000	2,497,500	28.7%

Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 6.7%, Nights ± 10.8%;

Intrastate CI: Visitors ± 6.8%, Nights ± 11.2%;

Interstate CI: Visitors ± 28.3%, Nights ± 40.2%;

International CI: Visitors ± 7.7%, Nights ± 17.8%.

Overnight Visitation by Tourism Region Cont.

Experience Perth

	YE Mar-15	YE Mar-16	% Change YE Mar-16 – YE Mar-15
Total			
Spend	3,786	3,896	2.9%
Visitors	4,203,400	4,493,300	6.9%
Nights	34,440,800	35,843,600	4.1%
Domestic Total			
Visitors	3,424,000	3,665,000	7.0%
Nights	11,265,000	14,038,000	24.6%
Intrastate			
Visitors	2,479,000	2,548,000	2.8%
Nights	6,238,000	7,248,000	16.2%
Interstate			
Visitors	945,000	1,117,000	18.2%
Nights	5,026,000	6,790,000	35.1%
International			
Visitors	779,400	828,300	6.3%
Nights	23,175,800	21,805,600	-5.9%

Note that estimates on this page are based on survey data and need to be considered with these Confidence Intervals.

Domestic CI: Visitors ± 5.7%, Nights ± 8.7%; **Intrastate CI:** Visitors ± 6.8%, Nights ± 12.1%;
Interstate CI: Visitors ± 10.3%, Nights ± 12.5%; **International CI:** Visitors ± 3.6%, Nights ± 6.7%.

Source:

The source of the data in this factsheet is Tourism Research Australia's (TRA) International and National Visitor Surveys (IVS and NVS respectively). For more information on the methodology of these surveys, see the [TRA website](#).

Definitions:

- **Overnight International Visitors:** International visitors aged 15 years and over who spent at least one night in the region and are visiting Australia for 12 months or less.
- **Overnight Domestic Visitors:** Australian residents aged 15 years and over who spent at least one night away from home in Western Australia. FIFO travel is included.
- **Daytrips:** Day trip 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. Only intrastate daytrips are included (i.e. daytrips made by WA residents).