



Tourism Western Australia

# Fast Facts Year Ending September 2015

Prepared by the Research Team

December 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 September 2015 are not directly comparable to domestic estimates for YE September 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

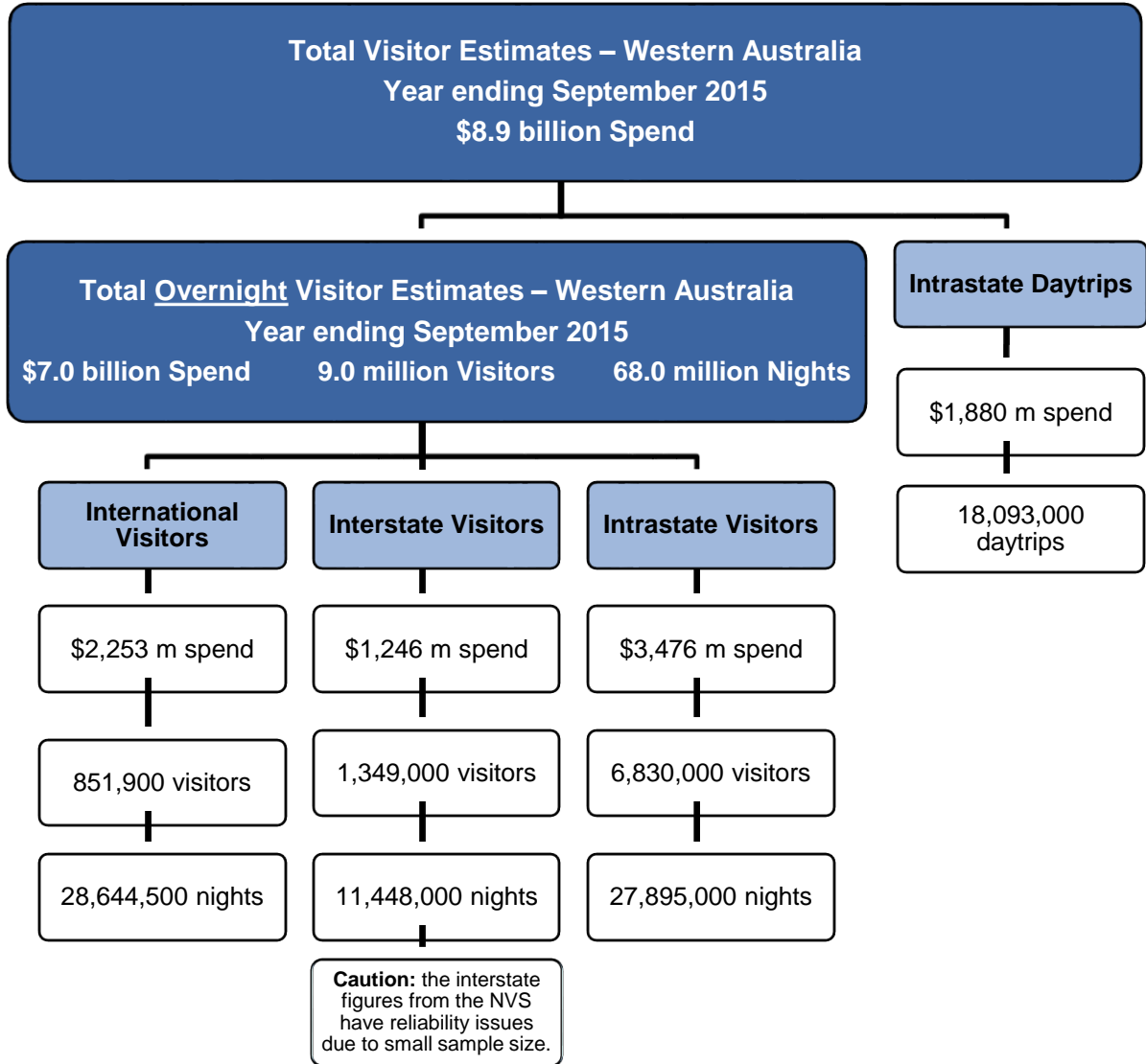
Note that estimates in this document are based on survey data and need to be considered within these Confidence Intervals (CI) for Western Australia YE September 2015 estimates:

- Intrastate CI: Spend  $\pm$  4.9%, Visitors  $\pm$  4.2%, Nights  $\pm$  6.2%
- Interstate CI: Spend  $\pm$  4.9%, Visitors  $\pm$  9.4%, Nights  $\pm$  9.7%
- International CI: Spend  $\pm$  6.2%, Visitors  $\pm$  3.6%, Nights  $\pm$  6.0%
- Intrastate Daytrip CI: Spend  $\pm$  7.7%, Visitors  $\pm$  4.6%

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

- Intrastate Visitors: n= 3,181
- Interstate Visitors: n= 603
- Domestic Spend: n= 3,494
- International: Spend n= 5,096, Visitors n= 5,912
- Intrastate Daytrip: Spend n= 2,191, Visitors n= 2,189

## Total Visitors to/within Western Australia Market Overview



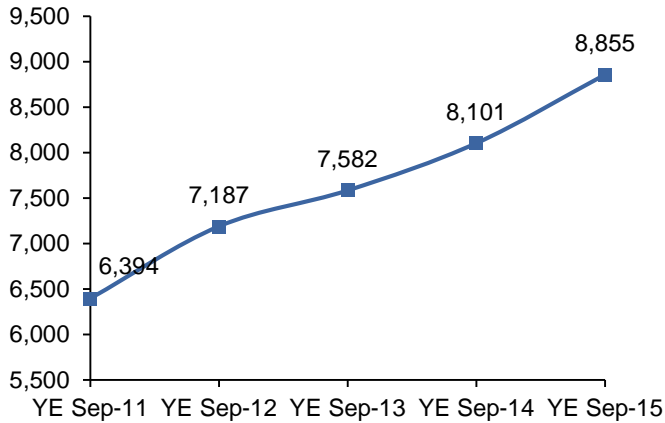
## Total Visitors to/within Western Australia Market Overview

### Spend

(+) 9.3%

- \$8,855 million in spend
- \$326 average spend per visitor
- 10.4% of visitor spend in Australia

Estimated Spend (\$m)

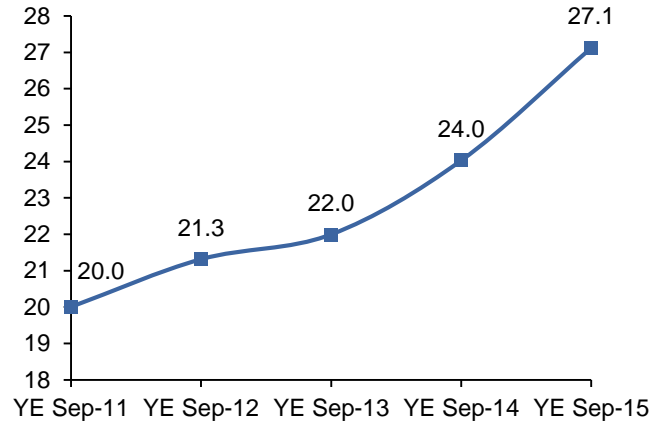


### Visitors

(+) 12.9%

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

Estimated Visitors (Million)

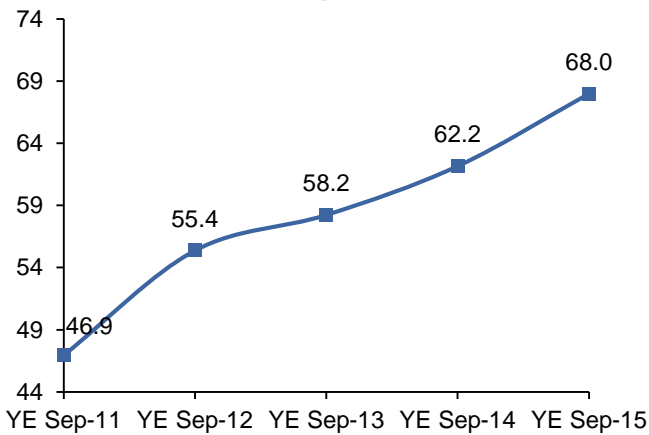


### Visitor Nights

(+) 9.4%

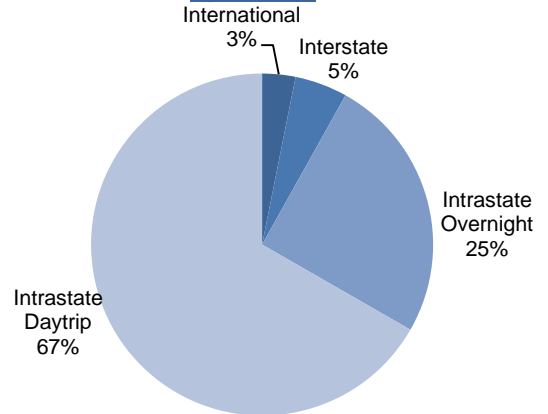
- 68.0 million nights
- 7.5 nights on average (based on overnight visitors only)
- 12.1% of visitor nights in Australia

Estimated Nights (Million)

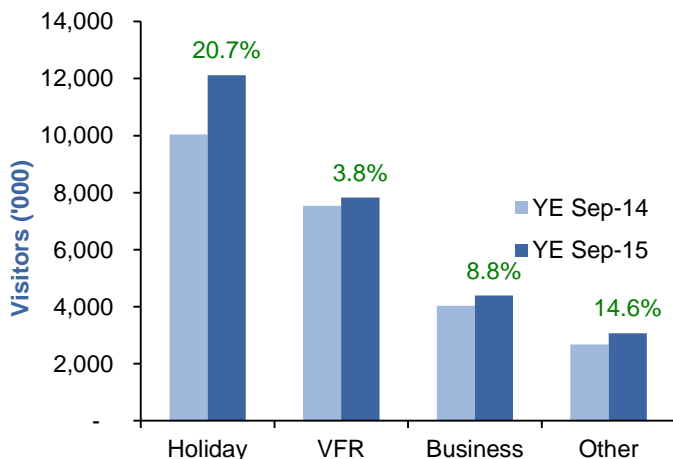


### Source Markets

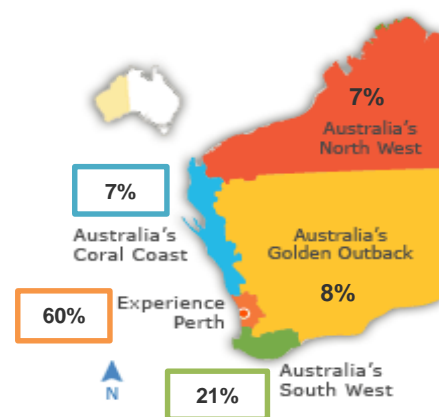
#### By Visitors



### Purpose of Visit



### Visitor Dispersal



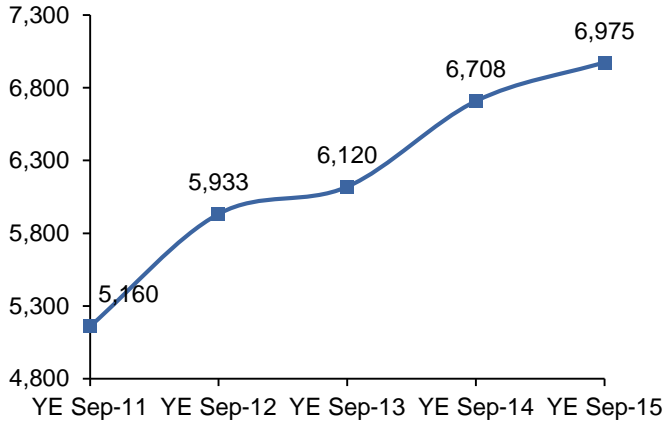
## Overnight Visitors to Western Australia Market Overview

### Spend

(+) 4.0%

- \$6,975 million in spend
- Average spend per visitor: \$772
- Average spend per night: \$103
- 10.4% of overnight visitor spend in Australia

Estimated Spend (\$m)

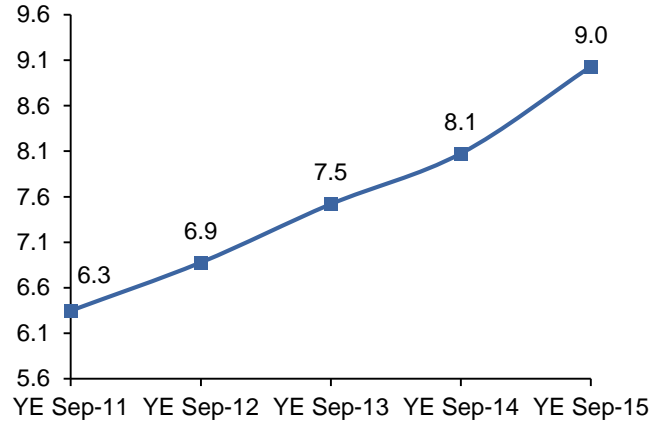


### Visitors

(+) 11.8%

- 9.0 million visitors
- 9.7% of overnight visitors in Australia

Estimated Visitors (Million)

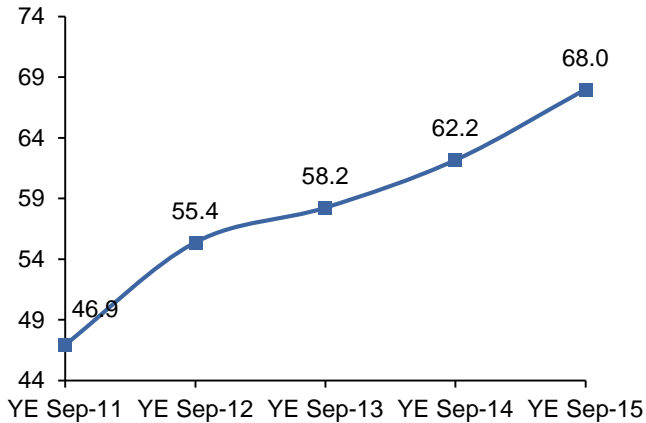


### Visitor Nights

(+) 9.4%

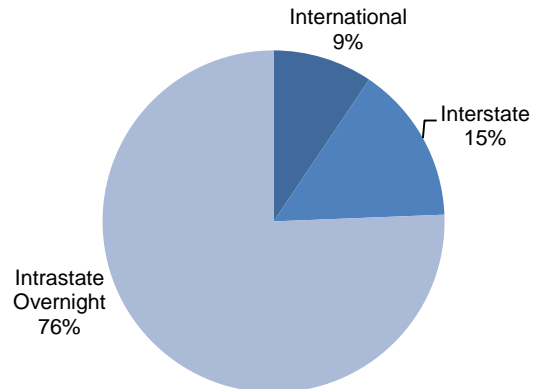
- 68.0 million nights
- 7.5 nights on average
- 12.1% of visitor nights in Australia

Estimated Nights (Million)

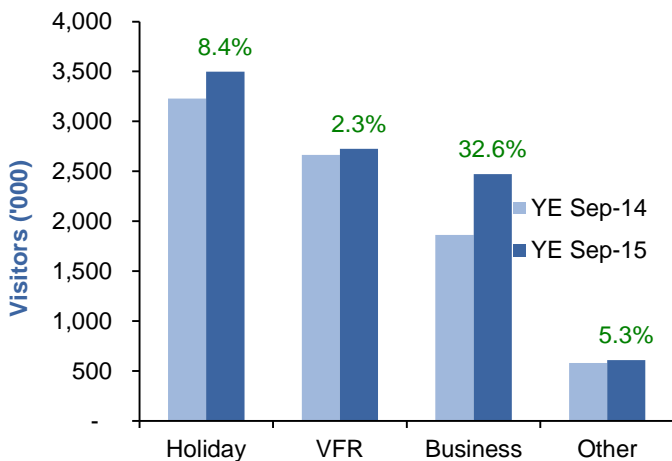


### Source Markets

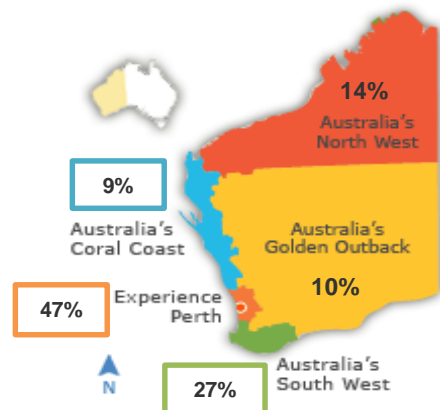
By Visitors



### Purpose of Visit



### Visitor Dispersal



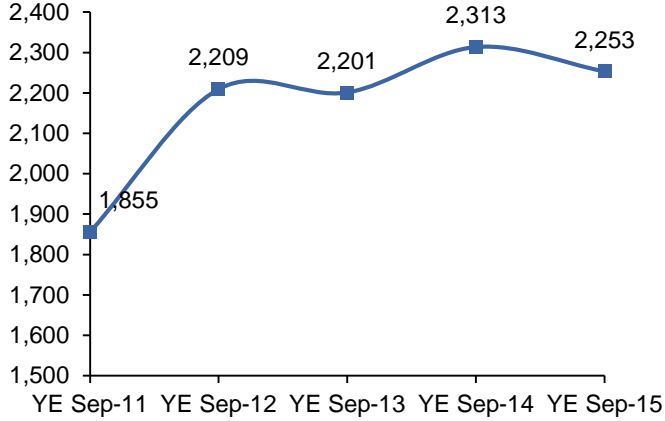
## International Visitors to Western Australia Market Overview

### Spend

(-) 2.6%

- \$2,253 million in spend
- Average spend per visitor: \$2,645
- 10.2% of international spend in Australia

Estimated Spend (\$m)

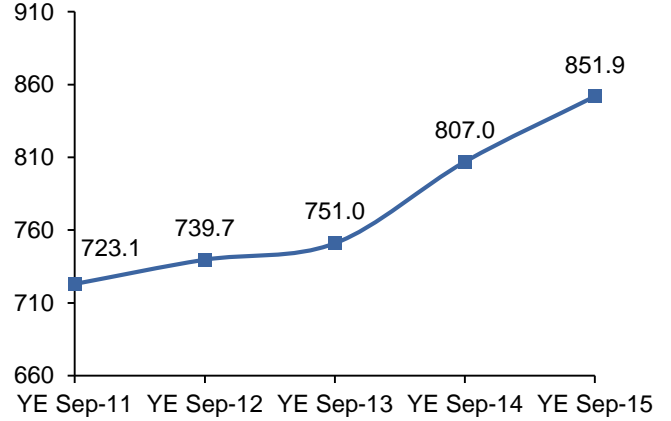


### Visitors

(+) 5.6%

- 851,900 visitors
- 12.8% of international visitors to Australia

Estimated Visitors ('000)

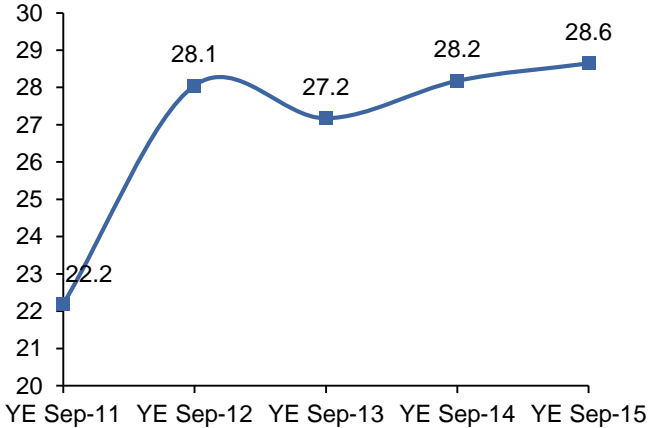


### Visitor Nights

(+) 1.7%

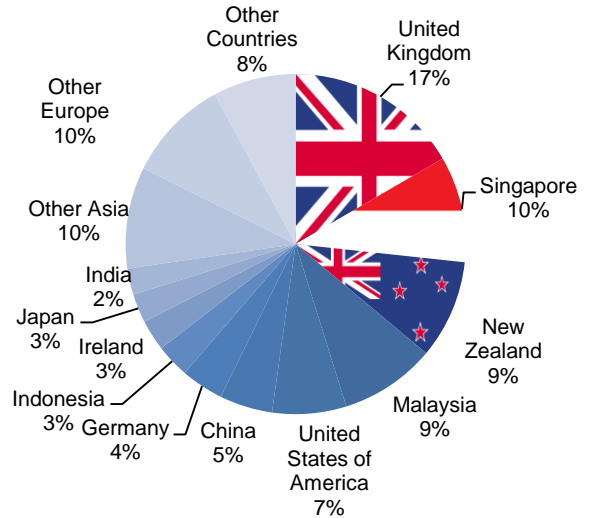
- 28.6 million nights
- 33.6 nights on average
- 11.8% of international visitor nights in Australia

Estimated Nights (Million)

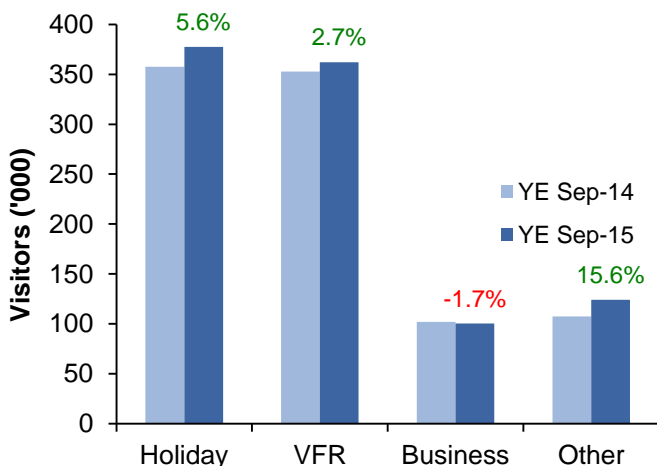


### Source Markets

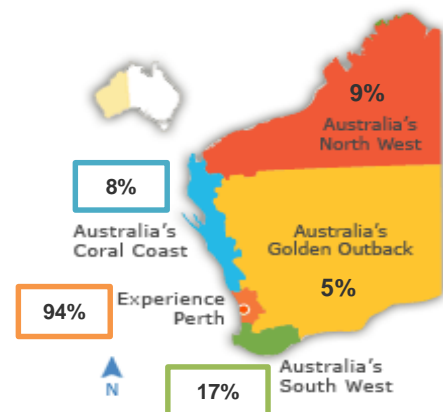
#### By Visitors



### 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 Sep-14	YE Sep-15	% Change	3 Year AAGR	Rank	YE Sep-14	YE Sep-15	% Change	3 Year AAGR
UK	1	349	282	-19.3%	-9.5%	2	1,954	1,914	-2.1%	2.6%
China	2	181	228	26.1%	18.5%	1	3,609	5,340	48.0%	28.5%
Malaysia	3	176	206	17.4%	16.5%	6	783	856	9.4%	9.2%
Singapore	4	193	186	-3.4%	8.2%	5	787	954	21.3%	12.1%
NZ	5	151	146	-3.7%	-10.2%	3	1,528	1,649	7.9%	4.8%
USA	6	113	133	16.9%	8.1%	4	1,192	1,337	12.2%	3.9%
Germany	7	78	86	10.9%	6.3%	11	599	627	4.7%	8.1%
Ireland	8	132	84	-36.2%	-21.8%	18	364	300	-17.5%	-23.2%
Hong Kong	9	81	82	1.6%	5.6%	7	688	813	18.1%	13.5%
France	10	64	71	12.5%	7.2%	12	439	511	16.4%	10.8%
Japan	11	62	62	-0.1%	22.5%	10	727	695	-4.4%	-0.7%
Indonesia	12	76	62	-19.2%	-8.0%	15	479	458	-4.3%	-3.2%
Taiwan	13	57	54	-4.3%	12.1%	13	499	510	2.2%	7.4%
Korea	14	70	49	-30.1%	-13.2%	8	744	786	5.6%	-1.4%
Philippines	15	56	47	-15.0%	1.2%	17	321	353	10.0%	11.9%
Canada	16	37	47	27.0%	12.0%	14	403	476	18.1%	7.4%
South Africa	17	46	46	-0.5%	-6.0%	24	150	133	-11.0%	-14.2%
Italy	18	40	45	13.1%	23.5%	19	317	283	-10.9%	0.9%
Scandinavia	19	30	36	18.8%	-17.7%	16	313	376	19.9%	4.7%
India	20	47	36	-24.3%	4.1%	9	530	706	33.1%	19.5%

## 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 Sep-14	YE Sep-15	% Change	3 Year AAGR	Rank	YE Sep-14	YE Sep-15	% Change	3 Year AAGR
UK	1	154,100	141,500	-8.2%	0.2%	3	630,300	634,500	0.7%	3.1%
Singapore	2	78,800	86,000	9.1%	19.0%	5	321,000	333,800	4.0%	8.7%
NZ	3	75,700	79,800	5.4%	-0.3%	1	1,123,00	1,176,10	4.7%	4.5%
Malaysia	4	67,000	77,500	15.7%	13.9%	7	286,600	298,400	4.1%	12.9%
USA	5	56,200	60,000	6.8%	9.7%	4	508,500	551,100	8.4%	9.7%
China	6	37,400	42,900	14.7%	13.8%	2	735,700	896,200	21.8%	15.6%
Germany	7	30,900	34,500	11.7%	10.0%	11	176,700	181,100	2.5%	6.6%
Indonesia	8	30,000	27,100	-9.7%	0.9%	12	134,800	135,700	0.7%	4.4%
Ireland	9	24,800	25,100	1.2%	0.4%	20	72,100	69,900	-3.1%	-4.9%
Japan	10	22,000	23,400	6.4%	11.6%	6	301,800	299,400	-0.8%	0.0%
India	11	15,100	21,300	41.1%	25.6%	8	177,800	213,100	19.9%	16.8%
France	12	19,600	19,500	-0.5%	0.3%	15	111,200	113,800	2.3%	4.9%
Hong Kong	13	17,500	18,400	5.1%	2.2%	10	183,800	193,300	5.2%	10.2%
Canada	14	17,100	18,200	6.4%	4.4%	13	128,200	135,000	5.3%	7.1%
Philippines	15	10,800	14,700	36.1%	23.7%	16	83,500	106,700	27.8%	19.9%
Scandinavia	16	12,500	14,300	14.4%	-4.3%	17	94,700	94,600	-0.1%	3.0%
South Africa	17	19,300	14,200	-26.4%	-9.7%	25	50,000	43,000	-14.0%	-13.4%
Italy	18	11,200	14,000	25.0%	16.6%	19	72,600	70,200	-3.3%	3.3%
Korea	19	11,600	13,600	17.2%	9.7%	9	184,700	197,400	6.9%	3.4%
Switzerland	20	11,500	12,900	12.2%	14.2%	22	48,000	51,000	6.3%	5.8%





## International Visitors to Western Australia Market Overview Cont.

### Market Share - Spend Estimates

(Ranked by overall spend estimates, YE September 2015)

Rank	Country of Residence	YE Sep-13	YE Sep-14	YE Sep-15
1	UK	18.9%	17.9%	14.7%
2	China	5.0%	5.0%	4.3%
3	Malaysia	21.2%	22.5%	24.1%
4	Singapore	20.9%	24.5%	19.5%
5	NZ	12.0%	9.9%	8.8%
6	USA	9.2%	9.5%	9.9%
7	Germany	14.2%	13.0%	13.8%
8	Ireland	27.1%	36.3%	28.1%
9	Hong Kong	11.7%	11.8%	10.1%
10	France	15.0%	14.5%	14.0%

### Market Share - Visitor Estimates

(Ranked by overall visitor estimates, YE September 2015)

Rank	Country of Residence	YE Sep-13	YE Sep-14	YE Sep-15
1	UK	23.6%	24.4%	22.3%
2	Singapore	21.5%	24.5%	25.8%
3	NZ	7.5%	6.7%	6.8%
4	Malaysia	25.5%	23.4%	26.0%
5	USA	10.9%	11.1%	10.9%
6	China	4.9%	5.1%	4.8%
7	Germany	17.9%	17.5%	19.1%
8	Indonesia	21.3%	22.3%	20.0%
9	Ireland	32.2%	34.4%	35.9%
10	Japan	6.3%	7.3%	7.8%

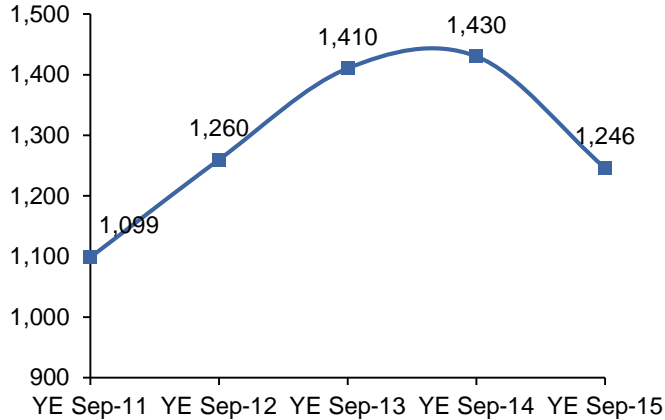
## Interstate Visitors to Western Australia Market Overview\*

### Spend

**(-) 12.9%**

- \$1,246 million in spend
- \$924 average spend per visitor
- 5.7% of interstate spend in Australia

Estimated Spend (\$m)

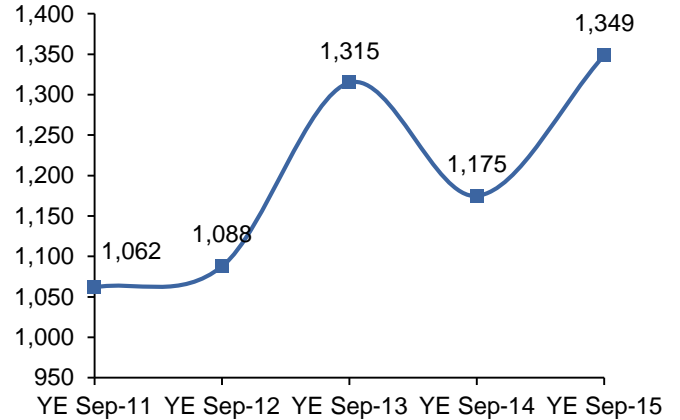


### Visitors

**(+) 14.8%**

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

Estimated Visitors ('000)

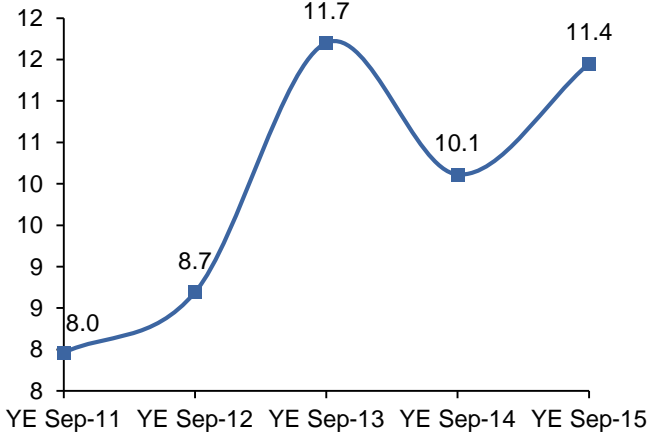


### Visitor Nights

**(+) 13.2%**

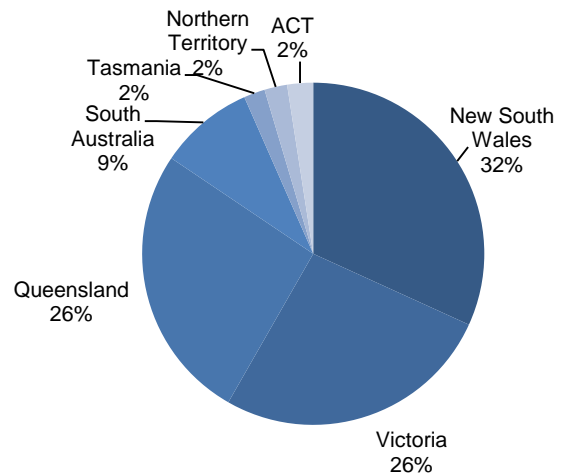
- 11.4 million nights
- 8.5 nights on average
- 8.3% of interstate visitor nights in Australia

Estimated Nights (Million)

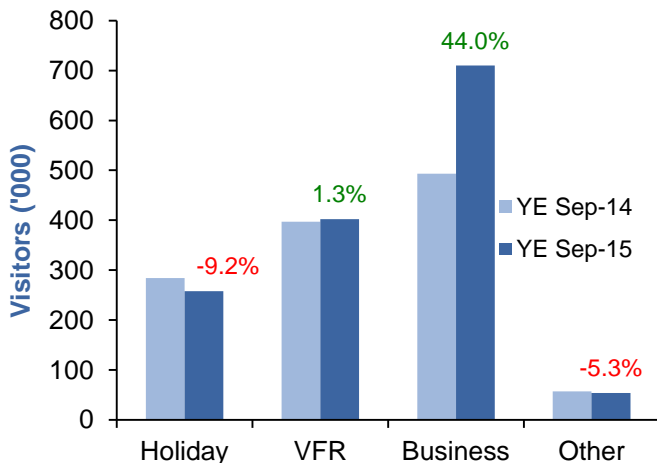


### Source Markets

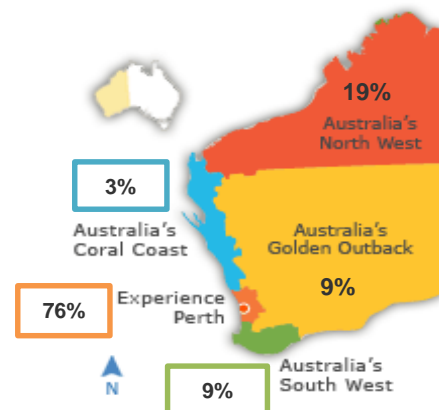
By Visitors



### Purpose of Visit



### Visitor Dispersal



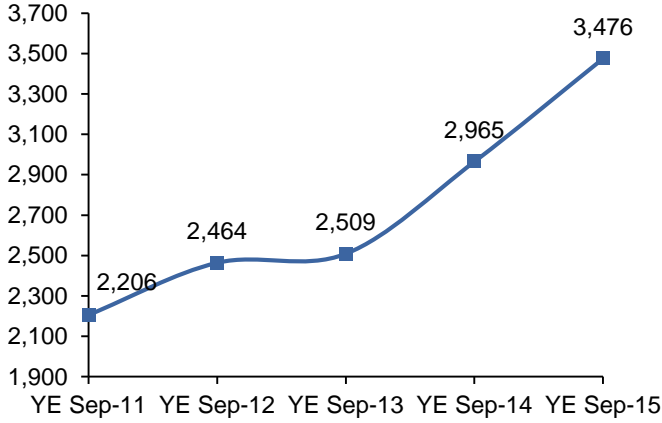
\*Estimates are based on a sample size of 580 and must be considered with the following confidence intervals: Spend  $\pm$  4.9%, Visitors  $\pm$  9.4%, Nights  $\pm$  9.7%

## Intrastate Overnight Visitors in Western Australia Market Overview

**Spend** (+) 17.2%

- \$3,476 million in spend
- \$509 average spend per visitor

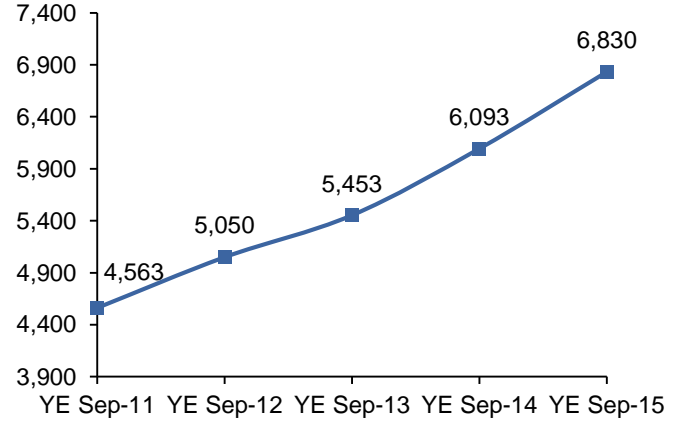
Estimated Spend (\$m)



**Visitors** (+) 12.1%

- 6.830 million visitors

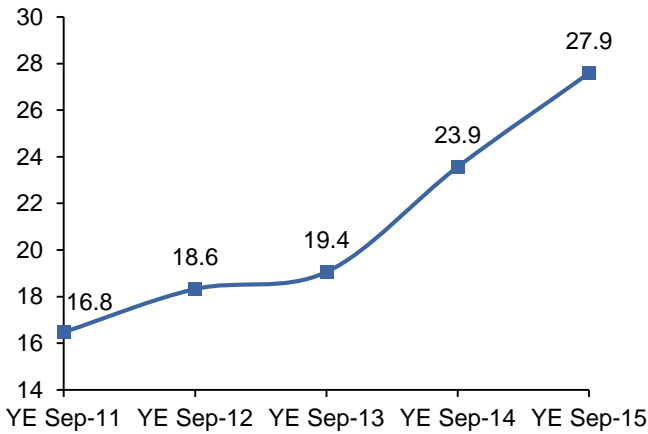
Estimated Visitors ('000)



**Visitor Nights** (+) 16.8%

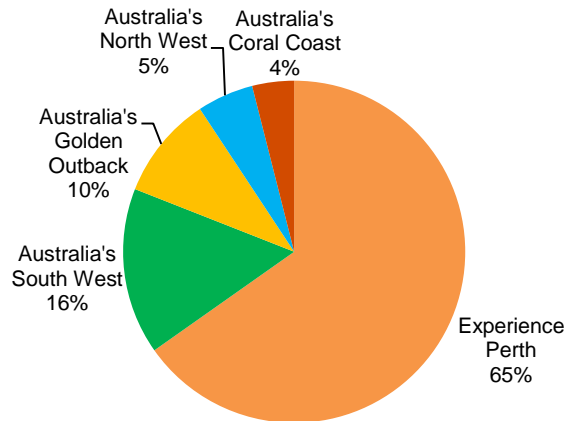
- 27.9 million nights
- 4.1 nights on average

Estimated Nights (Million)

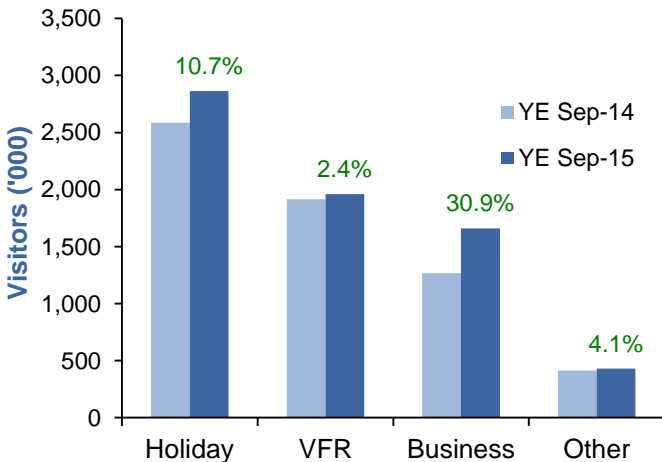


**Source Markets**

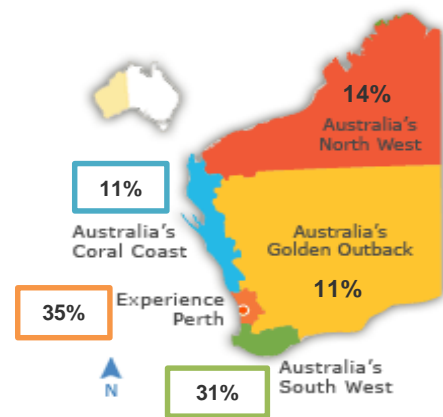
By Visitors



**Purpose of Visit**



**Visitor Dispersal**



## Intrastate Daytrip Visitors in Western Australia Market Overview

### Spend

(+) 35.0%

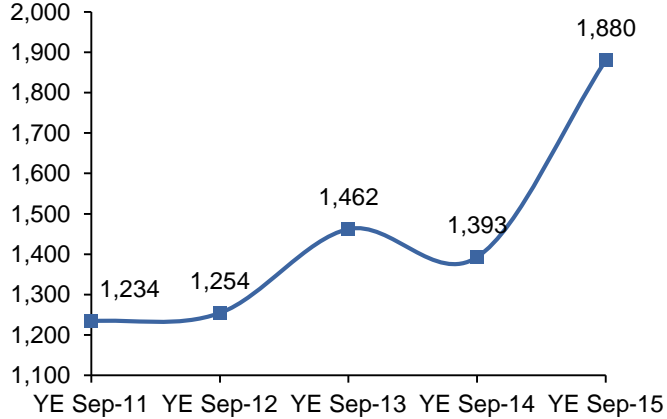
- \$1,880 million in spend
- \$104 average spend per visitor

### Visitors

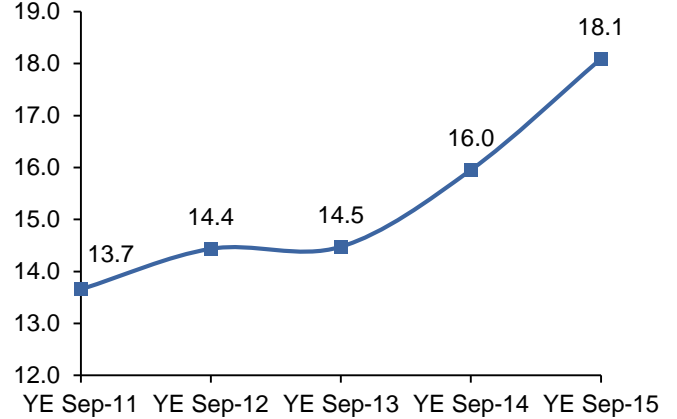
(+) 13.4%

- 18.1 million daytrips

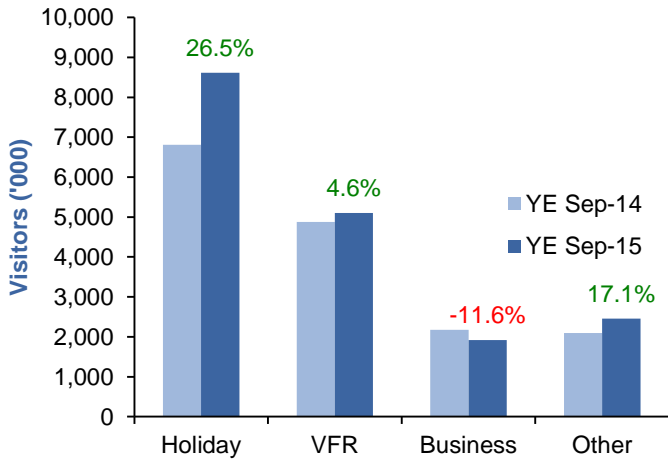
Estimated Spend (\$m)



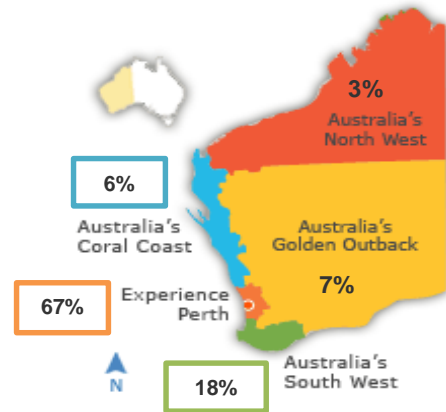
Estimated Visitors ('000)



### Purpose of Visit

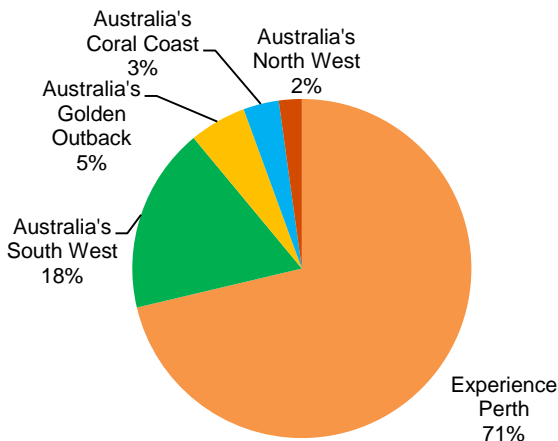


### Visitor Dispersal



### Source Markets

#### By Visitors



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

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

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