

Tourism Western Australia

Visitation to Western Australia: overview Year Ending December 2016

Prepared by the Research Team

March 2017



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.

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 for previous years**. It is important to keep this change in methodology in mind when looking at long term trends in the NVS results.

More recently, TRA has identified a methodology issue that has impacted the domestic estimates of recent quarters. TRA are currently investigating the issue and working to resolve it for the Year Ending March 2017 data release. It is possible the Year Ending December 2016 results reported here will be revised once the methodology issue has been rectified.

Confidence Intervals and Sample Sizes

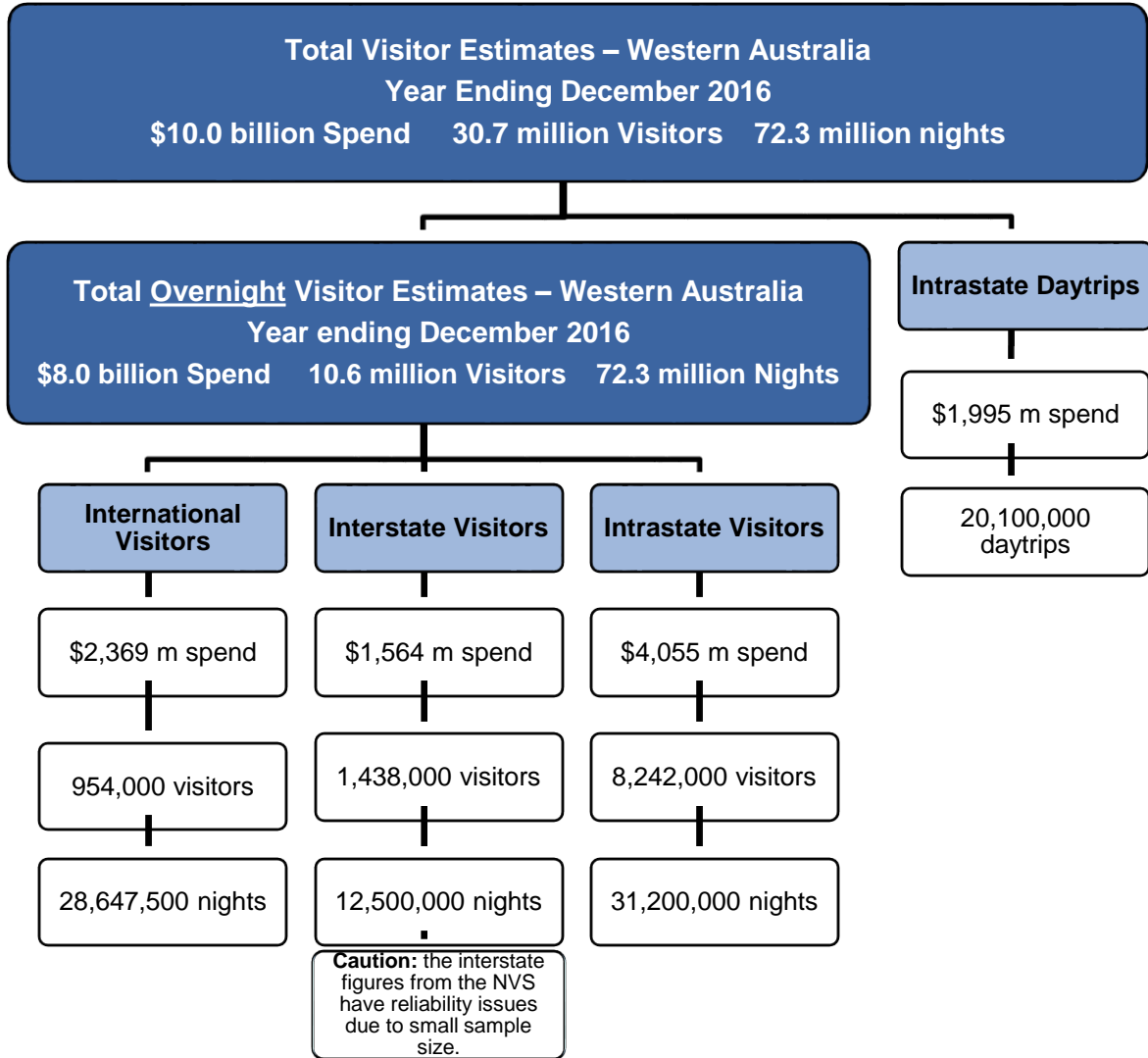
Note that estimates in this document are based on survey data and need to be considered within these Confidence Intervals (CI) for Western Australia YE December 2016 estimates:

- Intrastate CI: Spend \pm 4.9%, Visitors \pm 3.8%, Nights \pm 5.9%
- Interstate CI: Spend \pm 4.9%, Visitors \pm 9.1%, Nights \pm 9.2%
- International CI: Spend \pm 6.7%, Visitors \pm 3.4%, Nights \pm 6.0%
- Intrastate Daytrip CI: Spend \pm 5.9%, Visitors \pm 4.3%

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

- Intrastate Visitors: n= 3,765
- Interstate Visitors: n= 648
- Domestic Spend: n= 4,413
- International: Spend n= 5,927, Visitors n= 5,910
- Intrastate Daytrip: Spend n= 2,502, Visitors n= 2,500

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



Total Visitors to/within Western Australia Market Overview Cont.

Key Stats

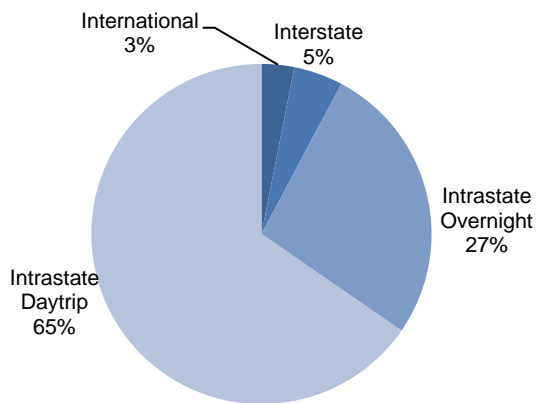
- \$9.982 billion in spend
- 30.7 million visitors (including both overnight visitors and daytrips)
- 72.3 million nights
- 4.5 nights on average (based on overnight visitors only)
- \$139 average spend per day

Market Share

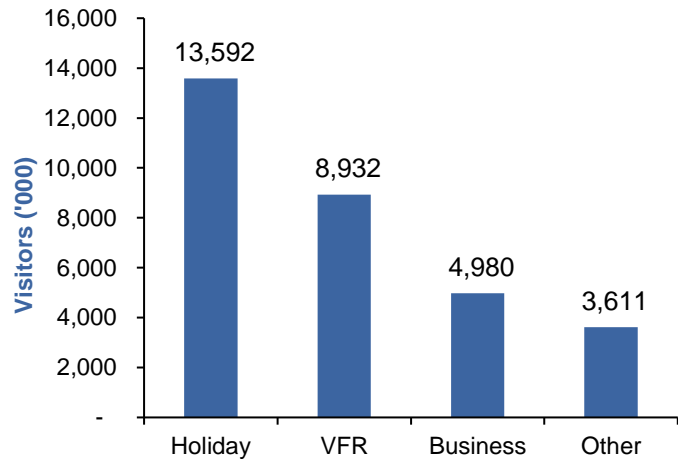
- 10.7% of visitor spend in Australia
- 11.0% of visitors to/in Australia
- 12.3% of visitor nights in Australia

Source Markets

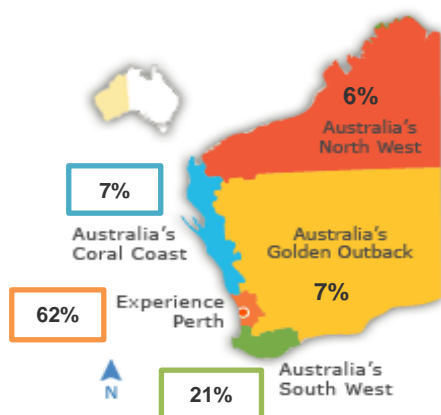
By Visitors



Purpose of Visit



Visitor Dispersal



Overnight Visitors to Western Australia Market Overview

Key Stats

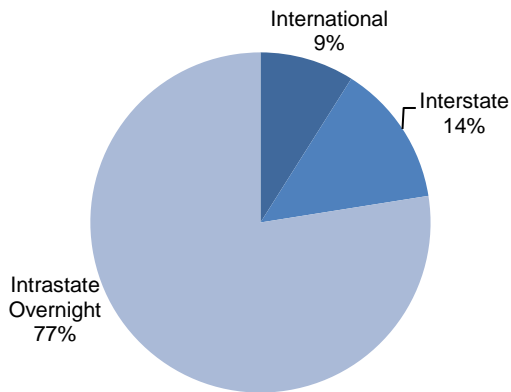
- \$8.037 billion in spend
- 10.6 million visitors
- 72.3 million nights
- 6.8 nights on average
- Average spend per visitor: \$756
- Average spend per night: \$111

Market Share

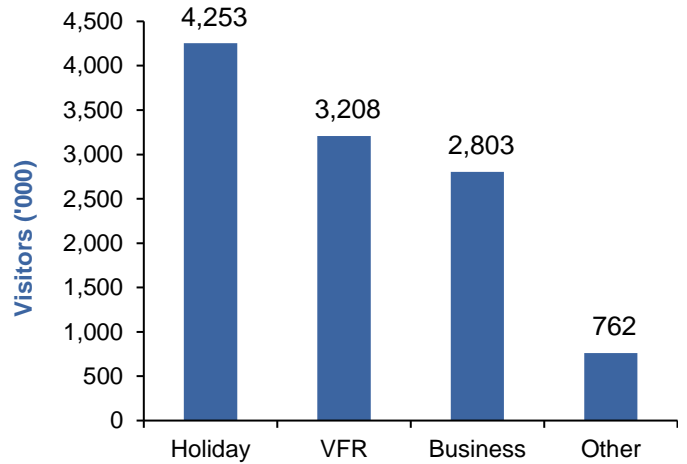
- 10.7% of overnight visitor spend in Australia
- 10.6% of overnight visitors in Australia
- 12.3% of visitor nights in Australia

Source Markets

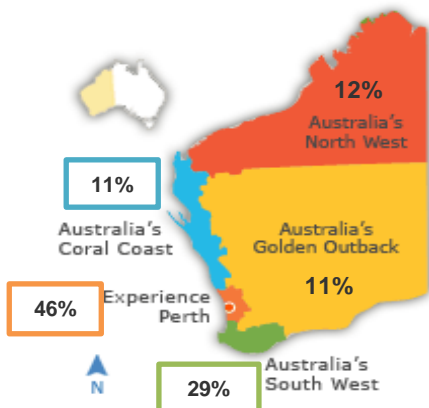
By Visitors



Purpose of Visit



Visitor Dispersal

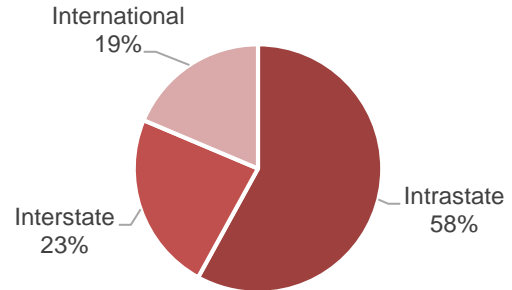


Overnight Visitation to Western Australia Tourism Regions

Experience Perth

	Visitors	Nights
Intrastate	2,816,000	6,975,000
Interstate	1,134,000	6,664,000
International	904,700	22,522,600
Total	4,854,700	36,161,600

Visitors:



	Spend (\$m)
Domestic	1,976
International	1,974
Total	3,949

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

Domestic CI: Visitors \pm 5.5%, Nights \pm 8.8%;

Interstate CI: Visitors \pm 10.2%, Nights \pm 12.6%;

Intrastate CI: Visitors \pm 6.5%, Nights \pm 12.3%;

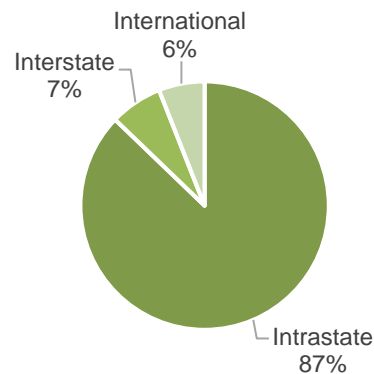
International CI: Visitors \pm 3.5%, Nights \pm 6.7%.

▲ **AAGR** = Average Annual Growth Rate

Australia's South West

	Visitors	Nights
Intrastate	2,678,000	8,736,000
Interstate	210,000	1,123,000
International	183,600	2,384,200
Total	3,071,600	12,243,200

Visitors:



	Spend (\$m)
Domestic	1,392
International	183
Total	1,575

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

Domestic CI: Visitors \pm 6.4%, Nights \pm 10.4%;

Interstate CI: Visitors \pm 23.4%, Nights \pm 30.6%;

Intrastate CI: Visitors \pm 6.7%, Nights \pm 11.0%;

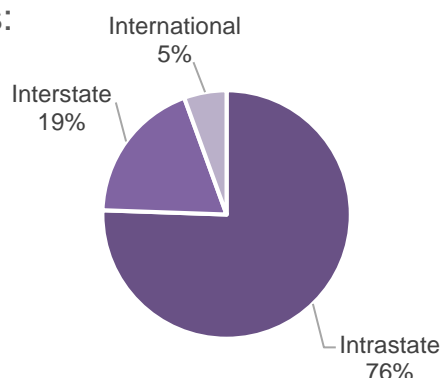
International CI: Visitors \pm 7.4%, Nights \pm 18.2%.

▲ **AAGR** = Average Annual Growth Rate

Australia's North West

	Visitors	Nights
Intrastate	987,000	6,907,000
Interstate	247,000	3,132,000
International	72,400	1,741,300
Total	1,306,400	11,780,300

Visitors:



	Spend (\$m)
Domestic	1,013
International	72
Total	1,085

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

Domestic CI: Visitors \pm 9.8%, Nights \pm 10.3%;

Intrastate CI: Visitors \pm 10.9%, Nights \pm 12.4%;

Interstate CI: Visitors \pm 21.6%, Nights \pm 18.4%;

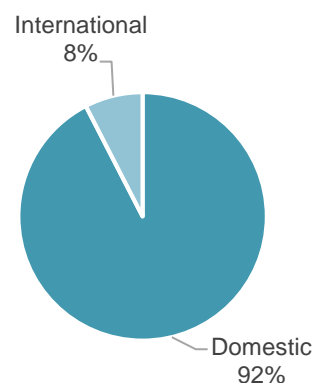
International CI: Visitors \pm 11.6%, Nights \pm 21.0%.

^ AAGR = Average Annual Growth Rate

Australia's Coral Coast

	Visitors	Nights
Domestic	1,088,000	4,828,000
International	89,000	942,900
Total	1,177,000	5,770,900

Visitors:



	Spend (\$m)
Domestic	687
International	104
Total	791

Sample size is insufficient to provide a breakdown of the domestic estimates by intrastate and interstate visitors.

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

Domestic CI: Visitors \pm 10.4%, Nights \pm 14.8%;

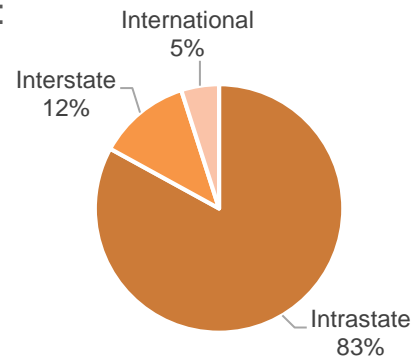
International CI: Visitors \pm 10.5%, Nights \pm 27.6%.

^ AAGR = Average Annual Growth Rate

Australia's Golden Outback

Visitors:

	Visitors	Nights
Intrastate	975,000	3,943,000
Interstate	142,000	849,000
International	57,900	900,700
Total	1,174,900	5,691,700



Spend (\$m)

Domestic	498
International	35
Total	532

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

Domestic CI: Visitors \pm 10.3%, Nights \pm 14.9%;

Intrastate CI: Visitors \pm 11.0%, Nights \pm 16.4%;

Interstate CI: Visitors \pm 28.4%, Nights \pm 35.2%;

International CI: Visitors \pm 12.9%, Nights \pm 28.2%.

^ **AAGR** = Average Annual Growth Rate



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.