

FACTBase

Bulletin 55, August 2017

Sizing Tourism in Western Australia

Gemma Davis

Introduction

Tourism has been identified as a key international growth sector, and in Australia and Western Australia, it is anticipated that tourism growth will have the capacity to create new jobs and assist in driving economic expansion in coming decades.

This Bulletin has been prepared as part of the *Bigger and Better Beyond the Boom* project. It aims to 'size' and spatially examine the tourism sector in Western Australia and the Perth and Peel region to quantify the contribution of tourism to the state and regional economy; to compare the contribution of tourism in WA to other Australian states and territories and to identify opportunities for economic growth.

Tourism in 'Post Mining Boom WA'

Western Australia's recent mining boom boosted much of the state's economy, yet the level of benefit differed substantially across economic sectors. Research by Pham et al. (2015) found that the influence of the mining boom on tourism in WA was mixed, with impacts on the supply side differing from those on the demand side, depending on whether the consumption is for business or leisure travel. The researchers determined that the

The key findings of this Bulletin are:

- Tourism is a growth industry in WA and Australia. The total contribution of tourism to the state economy has increased over the past decade with visitor growth trends in WA generally consistent with growth trends in Australia.
- Domestic tourism contributed 76% of direct state tourism Gross Value Added (GVA) in WA in 2015-16, with 63% of direct tourism GVA contributed by intrastate tourism – the highest share of any state or territory in Australia.
- While five-year domestic growth trends have been positive, intrastate and interstate visitor numbers declined in the Year Ending (YE) March 2016-17. This included significant reductions in intrastate and interstate visitor numbers in the March 2017 quarter. If this downward trend continues, it could substantially impact on the contribution of tourism to the WA economy moving forward.
- WA underperforms in the interstate sector, with the state attracting 4.6% of total national interstate visitors in YE March 2016-17. WA appears to be particularly underperforming in the attraction of interstate leisure visitors when compared to other states and territories.
- International visitor numbers have exhibited steady growth in WA over the past decade and provide a significant opportunity for future expansion. However, growth in visitor numbers has not been matched by commensurate growth in international visitor nights or expenditure. This appears to reflect a national trend towards shorter trip lengths, as well as declining visitor numbers and expenditure in the longer stay visitor category of employment.
- International and interstate visitors stay in WA 30 and 9.3 days respectively on average. This is longer than the average stay of visitors to other states. While this provides economic advantages it also reflects a key disadvantage, particularly in attracting domestic interstate visitors who, research indicates, prefer short trips when travelling domestically.
- Purpose of visit has a significant impact on visitor nights and visitor spend. For example, holiday visitors exhibit shorter stays and higher average expenditure per night while education and employment visitors stay for longer periods but spend less on a per night basis. This highlights the importance of attracting a diversity of visitors to the state.
- The Experience Perth region is the primary tourism destination for visitors to WA in all categories, particularly international visitors, 95% of whom stay in the Experience Perth region during their stay in WA. Australia's South West is the second most popular visitor region in WA.

continued on page 2

dominant income effect and subsequent upward price effect generated by the mining boom, stimulated domestic tourism demand positively, including business and employment tourism, but reduced demand for international and interstate inbound leisure tourism demand (Pham et al., 2015).

The leisure tourism sector was also affected by cost pressures, with increased competition for labour reducing the ability of industries associated with leisure tourism to attract and retain workers; and demand for business fly-in-fly-out (FIFO) travel increased the price of accommodation and air travel, which negatively impacted on the demand from inbound, intrastate and international tourists (Pham et al., 2015). Interstate travellers stopped travelling to WA during the mining boom as the state became more expensive compared to others. Strong appreciation in domestic currency, incomes and annual leave associated with FIFO work resulted in domestic trips being substituted with increased outbound travel, such as overseas trips, reducing potential intrastate and interstate travel gains (Pham et al., 2015; Sanders et al., 2016).

The cessation of the mining boom has been accompanied by a decline in domestic passengers travelling through Perth Airport from 9,900,901 in 2012-13 to 9,506,043 in 2015-16 (Perth Airport, 2017). This is most likely to reflect reduced FIFO travel.

This suggests that, while the recent slow-down in the mining and resources sector has had a negative impact on the state economy overall, it has the

- In YE March 2016-17, WA's largest inbound tourist markets were the UK, Malaysia and Singapore and the three largest markets for visitor spend were the UK, China and Singapore (TWA, 2017a). WA's fastest growing inbound tourism markets by visitor numbers in 2016-17 were Malaysia (32%), Singapore (27%), UK (22%) and USA (12%) and the fastest growing by visitor spend were Singapore, Malaysia, UK and Indonesia (TWA, 2017a).
- Proportionally, WA has been found to attract less than its population based share of visitors and visitor spend from key markets including China and New Zealand, with China being most notable. WA attracts 4.6% of Chinese visitors to Australia and 6.7% of total spending by Chinese visitors in Australia (TWA, 2017a). However, WA attracts more than its population based share of visitors and visitor spend from key markets including United Kingdom, Malaysia, Singapore and Germany.
- International visitor origin impacts on the tourism regions people choose to visit. Visitors from Malaysia, Singapore and China are most likely to visit Experience Perth and Australia's South West with only a small proportion venturing to Australia's Coral Coast; North West or Golden Outback. By contrast visitors from Germany, the USA and NZ are more likely to visit a range of regional destinations (TWA, 2017b). This highlights the importance of attracting visitors from diverse markets.
- The distance to WA from major eastern states attractions and capitals is a disadvantage for WA, however WA's beaches, wildlife, unspoilt and sparsely populated natural wilderness and island experiences provide opportunities for tourism in Perth and other regions in the state. Indigenous tourism experiences have also been identified as an opportunity for WA.
- Accessibility is essential to enable visitation and there is potential to increase access to WA by increasing the number and frequency of direct flights to the state as well as developing new regional airports with the capacity to accommodate flights from interstate capitals.
- There are opportunities for WA to identify and selectively promote the unique or distinctive characteristics of travel destinations in the state to the state's key domestic interstate and international tourism markets.

potential to benefit the leisure tourism sector. Reduced demand for low skilled labour and for business and employment travel, combined with a weaker Australian dollar, present opportunities for heightened competitiveness and growth in leisure tourism, including the attraction of intrastate, interstate and international holiday visitors.

National and International Tourism Forecasts and Trends

Tourism has been identified as one of five potential 'super-growth' sectors with capacity to drive new jobs and economic expansion in Australia over the next decade (Deloitte, 2013).

International and national research predicts that Asian markets, where middle-class populations are expected to grow five-fold over the next 20 years, will fuel demand for international travel over this period. In particular, demand for nature, space and luxury experiences among Asian travellers is expected to climb (Deloitte, 2013). Australia's proximity to Asia, as well as the nation's natural characteristics, which provide capacity for remote, nature based and luxury experiences, have been identified as providing opportunities for substantial tourism industry growth over this period (Deloitte, 2013).

Australia's tourism sector is already experiencing the benefits of Asia's growing middle class. In recent years, the expansion of tourism markets in Asia, combined with a weaker Australian dollar has stimulated growth in international visitors to Australia. International visitor numbers increased an estimated 69% in the 10 years from 2006-16 and total international visitor spend has reached \$38.1 billion (TRA, 2017a). Chinese visitors have driven growth in visitation from Asian markets and in 2015-16, visitors to Australia from China increased 23%, reaching almost 1.1 million visitors in total. This growth is expected to continue and by 2017-18 China is predicted to overtake NZ as Australia's top inbound visitor market (TRA, 2017).

In total, Tourism Research Australia forecast that international visitor numbers will continue to grow at a rate of 5.3% per annum over the coming three years, to reach 10.2 million international visitors by 2020-21. International visitor spend is expected to increase at a faster 9.6% per annum to \$60.3 billion (TRA, 2017).

Yet, while central to growth, China will not be the only tourism market of importance to Australia. Visitation from other Asian markets, including Japan, India and South Korea, as well as traditional markets such as the USA, are projected to increase in the five-year period to 2020-21, with visitors from the USA expected to overtake visitors from the UK over this period (TRA, 2017).

Holiday travel is expected to lead growth over the next five years and by 2021, 51% of all visitors, or 5.2 million visitors in Australia are expected to be holiday makers.

Those who are visiting friends and relatives (VFR) are anticipated to reach 2.6 million, an increase of 5.3% per annum (TRA, 2017). However, there is a trend of falling trip lengths i.e. fewer nights per visitor, with shorter stays being recorded in Australia and across most international markets and for most trip purposes (TRA, 2017).

Domestic Tourism

While international visitors have been identified as having the potential to drive tourism sector growth (Deloitte, 2013), it is domestic tourism that makes the biggest contribution to the Australian economy. In 2015-16 Australian residents made 88.9 million domestic overnight trips – the equivalent of more than 4.5 trips for each Australian resident aged 15 and over (TRA, 2017). Most (69%) of these trips were intrastate and as a result, the economic contribution of intrastate travel was higher than that of interstate travel – \$31.9 billion compared to \$27.1 billion (TRA, 2017). However, growth in interstate travel, which increased 8.0%, exceeded growth in intrastate travel, up 6.4% over the 2015-16 period (TRA, 2017).

In the coming five years, domestic overnight trips in Australia are predicted to increase 3.5% per annum to reach 105.7 million trips. Over the same period, nights are expected to grow 3.0% per annum to 380.5 million nights, while spend could increase 4.9% per annum to reach \$74.9 billion. It is predicted that growth in visitor nights will be driven by business trips, which are anticipated to increase 5.0% per annum to 85.7 million nights, and holiday trips, which are projected to increase 2.7% per annum to 160.3 million nights (TRA, 2017).

Outbound International Travel

An additional trend impacting on tourism in WA is outbound international tourism. Across Australia, outbound international travel has increased significantly, particularly outbound holiday travel. In 2005, Australian residents made 4,258,000 outbound international trips, 48% of which were for holiday purposes (TRA, 2016a). By 2015, the total number of outbound international trips had nearly doubled to 8,367,000 58% of which were for holiday purposes (TRA, 2016a). The destinations most often visited by Australian residents in 2015 were New Zealand, Indonesia and the United States of America, with travel to these destinations by Australian residents increasing 150%; 329%; and 231% respectively in the 10-year period from 2005-15 (TRA, 2016a).

The trend of increasing outbound international tourism in WA is reflected in Perth Airport statistics, which have experienced very substantial and continuous growth in outbound international passenger numbers over the past decade. For example, in 2015-16, 4,253,127 international passengers travelled through Perth Airport, more than double the 2005-06 total of 2,026,074 international passengers (Perth Airport, 2017).

Contribution of Tourism to Western Australian Economy

In 2015-16, visitors to Western Australia spent an estimated \$15.4 billion in the state, up from \$9.6/8.7 billion in 2014-15. This represents 12% of total spending by visitors in Australia (TRA, 2017f).

However Gross Value Added (GVA) is considered the most accurate measure of tourism's contribution to the economy. It includes total labour income, the capital revenue the industry receives, and net taxes on production (TRA, 2016). This Bulletin therefore measures the economic contribution of tourism by GVA and WA's 2015-16 Tourism Satellite Accounts provide the most recent estimate of tourism GVA in the state.

The Tourism Satellite Account for Western Australia indicates that in 2015-16, WA's tourism industry contributed 4.6% of total direct and indirect state GVA. By comparison, 23.8% of state GVA was generated by the mining industry; 13.6% by construction; 5.6% by health care and social assistance; and 5.2% by professional, scientific and technical services (TWA, 2017c). Directly and indirectly, tourism was estimated to generate 109,000 jobs, 8.1% of the state's total employment in 2015-16 (TWA, 2017c).

A breakdown of the direct and indirect contribution of tourism to GVA and employment in WA is outlined in Table 1.

Western Australia's tourism industry also makes an important contribution to the national economy. The total state share of national direct tourism GVA was 11.3% in 2015-16 (TWA, 2017c).

Table 1: Contribution of Tourism to WA Economy 2016

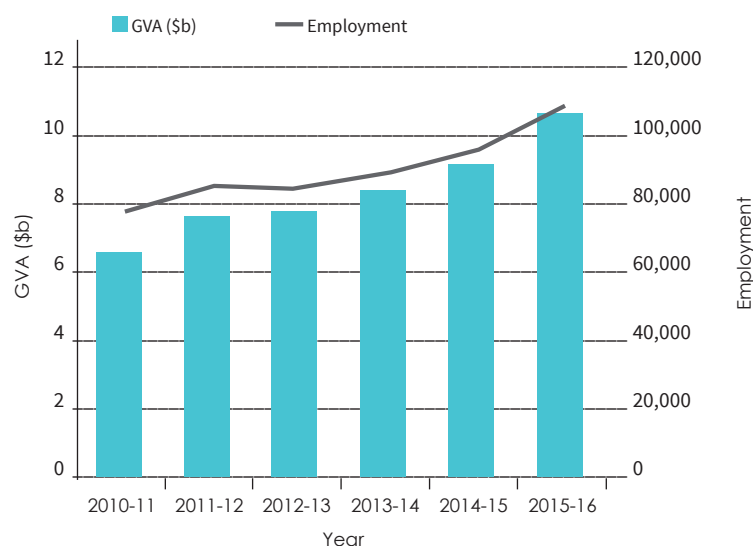
	Gross Value Added 2015-16	% of State Economy (GVA)	Employment 2015-16	% of State Total 2015-16
Direct	\$5.50 billion	2.4%	72,000	5.3%
Indirect	\$5.13 billion	2.2%	37,000	2.7%
Total	\$10.64 billion	4.6%	109,000	8.1%

Data Source: TWA, 2017c

Tourism GVA and Employment Over Time

Tourism is a growing industry. The total direct and indirect contribution of tourism to the Western Australian economy when measured by total GVA and total employment has increased over the past six years¹ (TWA, 2016; TWA, 2017c).

Figure 1: Growth in Total Direct Tourism GVA and Employment 2010-11 to 2015-16



Source: TWA, 2016; TWA, 2017c

¹ It is noted that the GVA figures for YE2015 and YE4014 are likely to be significantly revised due to revisions to the 2014 and 2015 National Visitor Survey data.

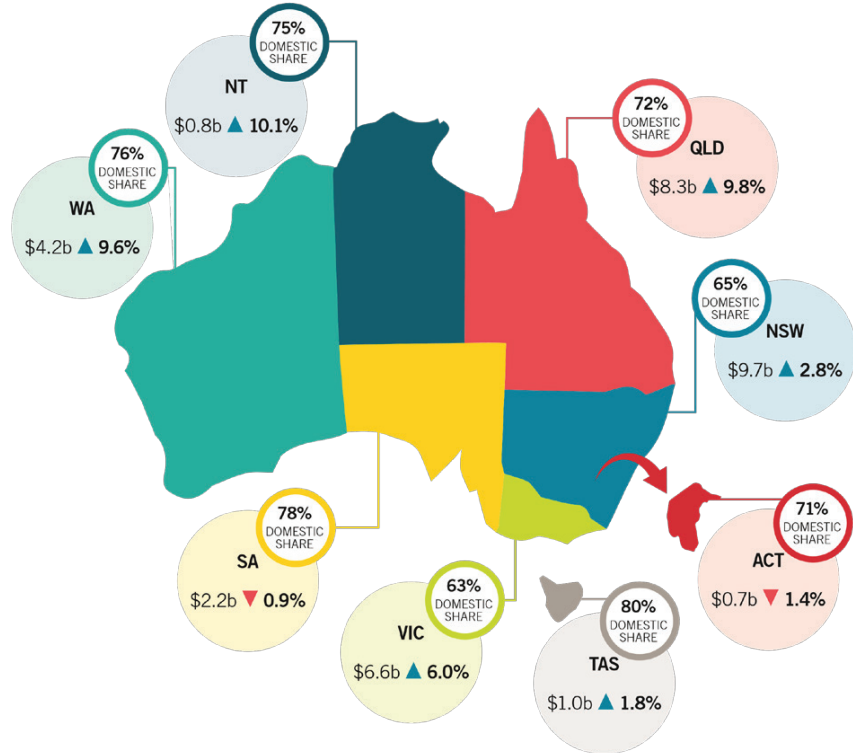
Contribution to Direct Tourism GVA by Tourist Category

When assessed by visitor category, it is evident that domestic tourism, i.e. intrastate and interstate overnight and day visitors, make the biggest contribution to the economy in Western Australia. In total, domestic tourism accounted for an estimated \$4.2 billion or 76% of direct tourism GVA in WA in 2015-16 (TRA, 2017f). This is not unique to WA. As illustrated in Figure 2, domestic tourism delivers the lion's share of direct tourism GVA in all Australian states and territories (TRA, 2017f).

Yet, what is distinctive to Western Australia is the proportion of GVA contributed by intrastate in comparison to interstate visitors. In the domestic tourism segment, the contribution of intrastate travel to tourism GVA was highest in Western Australia (63%), followed by New South Wales (47%) and Queensland (47%). By contrast, the portion of tourism GVA attributed to interstate travel was lowest in WA at 21% compared to 68% in the ACT; 53% in Tasmania; and 34% in NSW (TRA, 2017f).

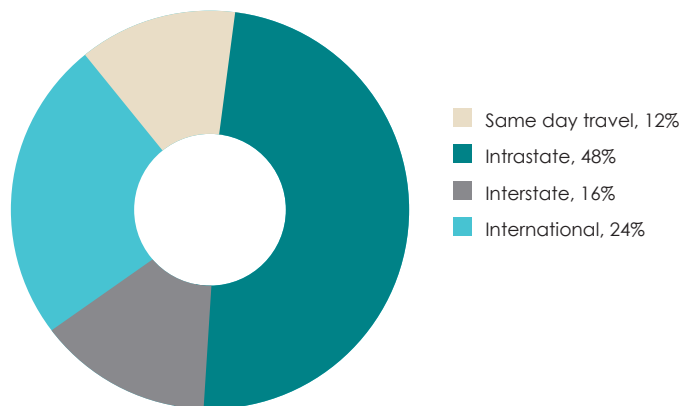
A breakdown of the contribution of intrastate, interstate and international visitors to direct GVA for Western Australia is provided in Figure 3. As illustrated in the figure, intrastate overnight and same day visitors contributed an estimated 48% and 12% of total direct tourism GVA respectively in 2015-16; while interstate visitors generated 16%; and international visitors 24% (TWA, 2017c).

Figure 2: Domestic Tourism GVA by State, 2015-16; Domestic Share in the State GVA, 2015-16; Annual Change in State GVA, 2015-16 ON 2014-15



Source: TRA, 2017f

Figure 3: Contribution to WA Direct GVA by Tourism Category 2015-16



Data Source: TWA, 2017c

Visitor Growth by Sector

This section examines visitor numbers, nights and expenditure primarily using data from the Year End (YE) March 2017 National Visitor and International Visitor Surveys.

The Bulletin primarily relies on YE March 2017 data because in June 2017, Tourism Research Australia significantly revised the National Visitor Survey (NVS) data for YE December 2014 and YE December 2015 and made minor revisions to YE December 2016 statistics. Therefore, time series NVS data for YE December published prior to June 2017 is not reliable. The YE March 2017 NVS data, which incorporates required amendments to 2014 and 2015 data therefore provides the most accurate representation of domestic visitor growth trends (TWA, 2017).

All published International Visitor Survey (IVS) annual, quarterly and time series data remains current, however for consistency YE March 2017 data has primarily been used to report on international visitor characteristics and trends.

Five Year Growth Trends

National and international visitor statistics for YE March 2013-16 show that the growing economic contribution of tourism to the WA economy has been driven by all visitor sectors including interstate, intrastate and international, although over the past five years, growth in the intrastate overnight visitor sector has been most notable, followed by the international and interstate overnight visitor sectors.

Table 2: Interstate, International and Intrastate Overnight Visitor, Visitor Night and Expenditure Growth YE March 2013-16 WA

Growth 2013-16	Interstate Overnight	International Overnight	Intrastate Overnight
Visitor Numbers	18.5%	28%	57%
Visitor Nights	31.25%	2%	68.5%
Visitor Expenditure	31%	9.7%	56.5%

Source: TWA, 2017; TWA, 2017a

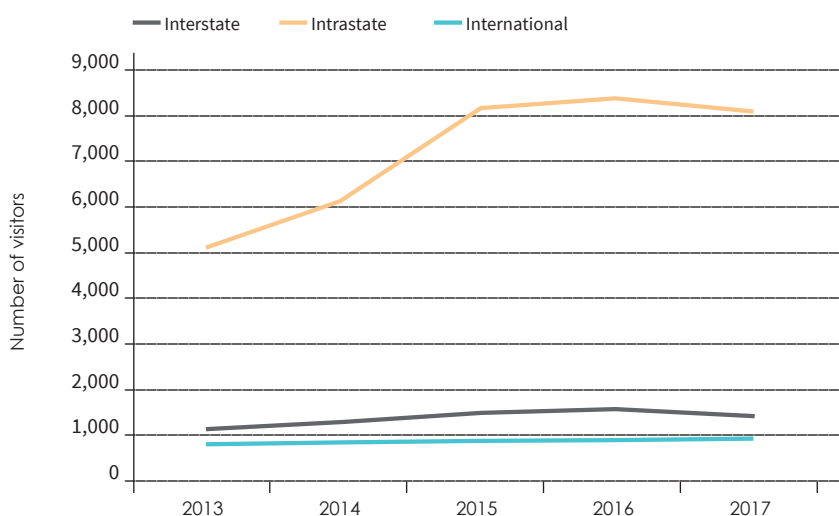
Table 2 provides an overview of estimated visitor numbers nights and expenditure in Western Australia in the period from YE March 2013-17.

As indicated in the table, there is evidence of positive growth in visitor numbers, nights and expenditure in the domestic tourism sector over the past five-year period (TWA, 2017). International visitor numbers have also increased in all categories although in the international sector, growth in visitor numbers has not been matched by commensurate growth in visitor nights (TWA, 2017a).

This is consistent with national and international trends.

Yet statistics show that domestic overnight visitor numbers, interstate and intrastate, have been in decline over the past 12 months (TWA, 2017). While this fall has not yet been reflected in a reduction in interstate visitor nights or expenditure, small reductions in intrastate visitor nights and expenditure have been recorded (TRA, 2017d). International visitor numbers have maintained steady growth over the 2013-17 period, as illustrated in Figure 4.

Figure 4: Domestic and International Overnight Visitor Growth YE March 2013-17 ('000s)



Data Source: TWA, 2017; TWA, 2017a

It is further noted that a significant fall in interstate visitor numbers and intrastate visitor nights was recorded in the March 2017 quarter (December 2016 to March 2017) with: 24% fewer interstate visitors; a 2.7% decline in interstate visitor nights; 7.5% fewer intrastate visitors; and a 12.1% reduction in intrastate visitor nights compared to the March 2016 quarter (TRA, 2017d). This indicates that the number of domestic visitors to WA is continuing to decline which is significant due to the high proportion of GVA contributed by domestic visitors.

By contrast, IVS results for the March quarter show continued growth of 9.1% in visitor numbers; 1.3% in visitor nights; and 7.9% in regional trip expenditure in the YE March 2016-17 (TRA, 2017e).

International Visitor Growth – National Comparison

In the YE March 2017, more than 950,000 international visitors came to WA, spending in excess of \$2.4 billion. This represents 12% of international visitors to Australia and 9% of total expenditure by international visitors nationally in 2016 (TWA, 2017a).

International visitor growth in WA over the past five years has been lower than that recorded

nationally, however 10 year growth trends are generally comparable. While international visitor numbers in WA increased an estimated 32% in the 2011-16 period and 53% in the 2006-16 period; nationally, international visitor numbers increased an estimated 43% in the five-year period from 2011-16 and 51% in the 10 year period from 2006-16 (TRA, 2017a).

Number of Visitors, Visitor Nights and Spending by Visitor Category

The contribution of domestic and international visitors to the economy is influenced by a range of factors which include total visitor numbers, length of stay, purpose of visit and spend per night. Table 3 below provides a summary of visitor numbers, nights and average spend by visitor category utilising YE March 2017 data. The data indicates that:

- Intrastate day-trippers are the largest category of visitors in WA.
- The biggest share of total spending by visitors in Western Australia was generated by intrastate overnight travellers. Intrastate visitors also spent the most on a per night basis.
- International visitors generated the most visitor nights on a per visitor basis, due to longer stays, on average.

- Per visitor or trip, international visitors to WA were the biggest spenders, yet international visitors spent the least on a per night basis.
- Interstate travel in WA generated relatively low visitor numbers, accounting for 4.6% of interstate travel in Australia in YE March 2017, and the least visitor nights, however these visitors were relatively high spenders on a per night basis (TWA, 2017).

Comparing the profile of visitors to WA with the profile of visitors nationally, a notable difference in WA is length of stay. While average length of stay for interstate trips within Australia in the YE March 2017 was 4.5 nights, when visiting WA, interstate visitors stayed an average of 9.3 nights (TRA, 2017e).

International visitors to WA also stayed longer than visitors to other states and territories, spending an average of 30 nights in the state in the YE March 2017, the highest average stay of all states and territories, as outlined in Table 4 (TRA, 2017e). Yet this also illustrates that longer visitor stays are also associated with lower average estimated expenditure per night.

Table 3: Summary of Visitor Numbers, Visitor Nights and Visitor Spending by Category WA YE March 2017

	Interstate Overnight	International Overnight	Intrastate Overnight	Intrastate Day-trippers
Total Visitors	1,400,000	953,800	8,100,000	19,400,000
Total Spending	\$1,526,000,000	\$2,439,000,000	\$4,026,000,000	\$2,145,000,000
Total Nights	12,600,000	28,500,000	30,500,000	N/A
Average nights per visitor	9.3	30	3.8	N/A
Average spend per visitor	\$1,125.3	\$2,557	\$501	\$111
Average spend per night	\$121	\$85	\$132	N/A

Data Source: TWA, 2017; TWA, 2017a

Purpose of Visit by Visitor Category

Purpose of visit provides an insight into the factors that attract visitors to WA. It is also a key factor influencing visitor nights and spend.

Statistics from the Tourism Research Australia's National Visitor Surveys indicate that holiday is most commonly cited as the reason for intrastate travel in WA, followed by VFR (TRA, 2017e). However, interstate visitors are most likely to travel to WA for business purposes (see Table 5).

The dominance of interstate business visitors is unique to WA. National data indicates that holiday is the most common reason for interstate travel to all Australian states and territories except WA and the ACT, where VFR is the dominant reason for interstate travel (TRA, 2017d).

Yet, it is noted that domestic overnight travel to and within WA declined significantly in the March 2017 quarter (TRA, 2017d) and, in the interstate sector, this fall was associated with a 17.4% decline in visitors travelling to WA for business purposes and a 9.5% reduction in business visitor nights from YE March 2016-17 (TRA, 2017d).

Table 4: International Visitor Expenditure and Visitor Nights, Comparison between Australian States YE March 2017

Year Ending December 2016	Average Estimated Expenditure Per Visitor	Average Estimated Expenditure Per Visitor Night	Average Estimated Nights Per Visitor
Victoria	\$2,684	\$109	24.6
New South Wales	\$2,507	\$109	23
Queensland	\$2,007	\$97	21
South Australia	\$2,449	\$101	24
Western Australia	\$2,611	\$87	30
Tasmania	\$1,696	\$117	14
Northern Territory	\$1,544	\$119	13
ACT	\$2,439	\$115	21

Data Source: TRA, 2017e

Note: There are minor differences between the TRA and TWA data reported in Tables 3 and 4 due to differences in the methodology applied by these organisations when calculating total regional expenditure.

In addition, intrastate visitor numbers and nights declined in the March 2017 quarter, impacted by falling leisure travel. This resulted in 13.0% fewer VFR trips and a 14.0% decline in VFR nights being recorded within WA in the YE March 2016-17. It was also reflected in an increase in the proportion of intrastate travel for business in the YE March 2017 (TRA, 2017d).

International Visitor Growth by Purpose of Visit

International visitor statistics also indicate that WA attracts a lower proportion of holiday visitors and a higher proportion of international VFR travellers when compared to other

states in Australia. Forty-one per cent of all international visitors to WA in YE March 2016-17 were visiting friends and relatives, while 50% were holiday visitors. By contrast, 58.5% of international visitors to NSW; 57% of international visitors to SA; 55% of visitors to VIC; and 70% of international visitors to QLD in 2016 travelled for holiday purposes (TRA, 2017e).

The proportion of international holiday visitors in WA is increasing. In YE March 2016-17, international visitors in the holiday category grew 18%; education visitors increased 22%; business visitor numbers increased 7.5%; and VFR increased 3%, as outlined in Table 6 (TRA, 2017e).

Table 5: WA Purpose of Visit by Visitor Category YE March 2017

Purpose of Travel	Interstate Overnight YE March 2017	International Overnight YE March 2017	Intrastate Overnight YE March 2017	Intrastate Day-trippers YE March 2017
Holiday	26%	50%	41%	46%
Visiting Friends and Relatives	35%	41%	26%	27%
Business	40%	11%	26%	11%
Other	n.p.	10%	7%	15%

Data Source: TRA 2017d; TRA 2017e

However, visitor nights declined in most categories, with the exception of education, and expenditure decreased 22% in the employment and 3% in the business category (TRA, 2017e). This decline is consistent with national trends (TRA, 2017a).

Purpose of Visit and Visitor Expenditure

Purpose of visit has a significant impact on the economic contribution of tourism. For example, domestic visitor data indicates that purpose of travel influences both visitor spending and visitor nights. In 2016-17, domestic holiday and business travellers in Australia had the highest expenditure, spending an average of \$841 and \$805 per visitor respectively, compared to \$394 per VFR visitor (TRA, 2017d).

Similarly, international visitor statistics reveal that international visitors travelling for education and employment purposes spend more per visitor, with an average of approx. \$19,983 and \$8,634 respectively compared to an average of approx. \$4,273 for holiday visitors, \$3,995 for business travellers and \$2,972 for VFR visitors, but that holiday, business and VFR travellers spend more on a per night basis (TRA, 2017e).

This highlights the importance of attracting a diverse range of domestic and international visitors across all categories including short-stay, high per night spend holiday visitors; and long-stay, high total spend, education and employment visitors.

Table 6: WA International Visitor Numbers, Nights and Expenditure Growth YE March 2017 by Purpose of Visit

Western Australia	Visitor Numbers Growth Mar 2017	Visitor Nights Growth Mar 2017	Expenditure Growth Mar 2017
Holiday	17.7%	4%	8%
VFR	3.0%	-5%	3%
Business	7.5%	1%	-3%
Employment	-21%	-21%	-22%
Education	22%	30%	30%

Data Source: TEA 2017e

Visitation by Tourism Region

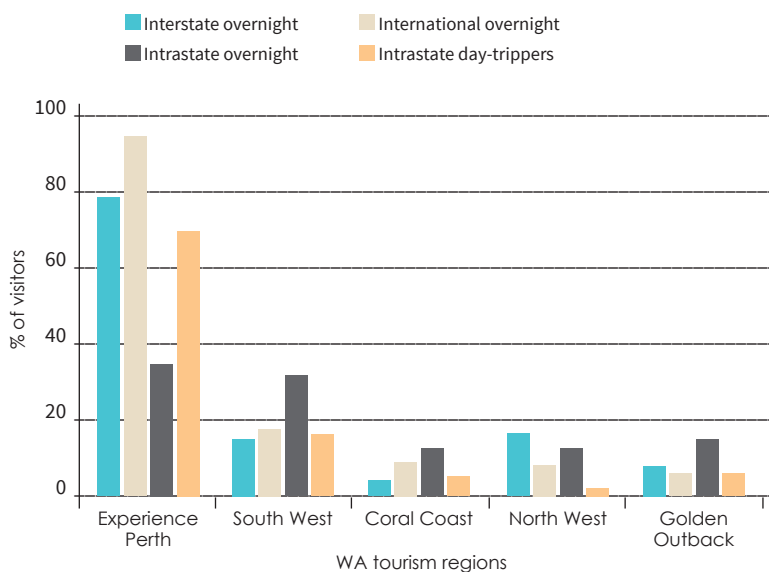
There are five designated tourism regions in WA: Experience Perth; Australia's South West; Australia's Coral Coast; Australia's Golden Outback; and Australia's North West (ABS, 2016a). A map of WA's tourism regions is provided at Appendix A.

In WA, the Experience Perth region receives the most visitors in all categories, with a notable dominance of international

overnight visitors (95%) and domestic interstate visitors (78%) staying within the region in 2016-17 (TWA, 2017; TWA, 2017a). A smaller 34% of intrastate overnight visitors travelled to Experience Perth, with Australia's South West the next most common destination, attracting 32% of intrastate overnight visitors in 2016 (TWA, 2017a).

Visitation statistics for the Experience Perth region and for other Western Australian regions is illustrated in Figure 5.

Figure 5: Proportion of Visitors Visiting WA Tourism Regions by Visitor Category 2017



Data Source: TWA, 2017; TWA, 2017a

Australia's South West was the most commonly visited regional destination in all categories except interstate overnight visitors, who were more likely to visit Australia's North West (17%) than South West (16%). This may reflect the accessibility of the North West, with direct flights available to Broome from major eastern states capitals.

International visitor data indicates that while the proportion of international visitors travelling to regional WA (50%) is lower than the Australian average (68%), the dominance of the capital city as a destination is not unique to the state (TRA, 2017e). In fact, WA attracts a higher proportion of international tourists to regional destinations than NSW or Victoria. For example, in 2016-17, 95% of visitors to NSW visited Sydney and 42% visited regional NSW; 97% of international visitors to VIC visited Melbourne and 27% visited regional Victoria (TRA, 2017e).

Exceptions to this visitor pattern are: Queensland, where regional destinations are visited by 74% of visitors while 60% visit the capital city, Brisbane; the Northern Territory where 82% of international visitors visit regional locations while 49% visit Darwin; and Tasmania where 88% international visitors visit Hobart but regional destinations also attract a strong 63% of visitors (TRA, 2017e).

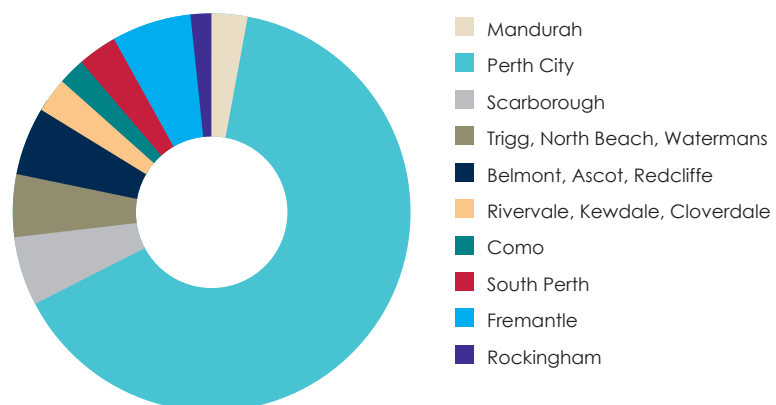
However, nationally the proportion of Australia's international visitors visiting regional destinations has been in decline (TRA, 2017a).

Tourism Nodes in Experience Perth Region

Australian Bureau of Statistics (ABS) tourist accommodation data provides an insight into the primary tourism nodes in the Experience Perth region. The most recent quarterly data for the region, first quarter 2016, indicates that Perth City is the dominant tourism node in the Experience Perth region, accommodating an estimated 59% of commercial accommodation nights in the region, a far higher proportion than any other tourism node (ABS, 2016).

Scarborough, Trigg, North Beach, Watermans and Belmont-Ascot-Redcliffe are nodes of secondary significance, each accommodating an estimated 5% of commercial visitor accommodation nights in the region (ABS, 2016). The proportion of commercial accommodation nights within each of the primary tourism accommodation nodes, accommodating more than approximately 1% of commercial accommodation nights, within Experience Perth is illustrated in Figure 6.

Figure 6: Estimated Visitor Night Dispersal in the Experience Perth Region (First Quarter 2016)



Data Source: ABS, 2016

This highlights the preference of visitors for city centre accommodation locations; accommodation in coastal locations; and accommodation in proximity to the region's international and domestic airport terminals.

International Visitor Origin

The origin of interstate visitors to the Perth region generally reflects the dispersal of population nation-wide with the primary markets for interstate visitors to WA being New South Wales (32%) and Victoria (31%) followed by Queensland (18%) and South Australia (12%) (TWA, 2017).

It is noted that the proportion of visitors from Victoria and South Australia is slightly higher than the proportion of population living in the state, and the proportion of visitors to WA from Queensland being lower than could be expected based on the population base of the state.

International visitor expenditure, length of stay and destination also varies according to visitor

origin and the top 10 markets for international visitors to WA differ to those for Australia nationwide.

In YE March 2016-17, Australia's three largest inbound markets for total visitor arrivals were New Zealand, China and the USA and the three largest inbound markets for total visitor spend were China, the UK and NZ (TWA, 2017a).

By contrast, WA's largest inbound tourist markets were the UK, Malaysia and Singapore and the three largest markets for visitor spend were the UK, China and Singapore (TWA, 2017a).

WA's fastest growing inbound tourism markets by visitor numbers in 2016-17 were Malaysia (32%), Singapore (27%), UK (22%) and USA (12%) and the fastest growing by visitor spend were Singapore, Malaysia, UK and Indonesia (TWA, 2017a). Characteristics of the top 10 consumer markets for inbound tourists to WA compared to the top 10 markets in Australia are outlined in Table 7.

Proportionally, WA has been found to attract less than its population based share of visitors and visitor spend from key markets including China and New Zealand, with China being most notable. WA attracts 4.6% of Chinese visitors to Australia and 6.7% of total spending by Chinese visitors in Australia (TWA, 2017a).

However, WA attracts more than its population based share of visitors and visitor spend from key markets including United Kingdom, Malaysia, Singapore and Germany. This is significant because visitor origin has a significant impact on visitor nights and expenditure, as illustrated in Table 8. In 2015, visitors from Asian markets including China, Malaysia and Singapore reported the highest expenditure per visitor on a per trip and per night basis (TWA, 2017a).

Table 7: Characteristics of Top Ten International Inbound Visitor Markets (WA) with National Performance YE March 2017

Country of Residence	Rank (by Visitor Number)	Visitor Numbers	3 Year AAGR*	Visitor Spend (Millions)	3 Year AAGR	Rank (by Visitor Number)	Visitor Numbers	3 Year AAGR	Visitor Spend (Millions)	3 Year AAGR
UK	1	151,200	2.8%	287	-6.9%	4	674,300	3.4%	1,926	0.1%
Malaysia	2	111,700	24.8%	271	12.1%	7	347,300	9.7%	7,007	25.0%
Singapore	3	104,500	12.3%	253	19.6%	6	381,800	8.4%	1,055	12.2%
USA	4	80,300	18.3%	220	7.4%	3	683,800	13.1%	1,018	11.5%
NZ	5	73,000	-4.6%	149	11.9%	1	1,227,900	3.7%	1,652	14.7%
China	6	52,600	13.7%	115	-13.9%	2	1,141,800	17.4%	1,720	3.5%
Germany	7	37,400	7.4%	92	-5.7%	11	199,400	5.0%	903	7.9%
Indonesia	8	29,300	2.1%	81	0.0%	12	160,100	7.7%	685	7.1%
Japan	9	26,100	5.6%	81	18.7%	5	390,400	14.6%	914	21.8%
India	10	24,900	17.6%	68	-0.1%	9	251,800	11.7%	555	12.8%

Data Source: TWA, 2017a

*AAGR: Average Annual Growth Rate

Visitor origin also impacts on visitation to regions outside Experience Perth. As illustrated in Figure 7, visitors from Malaysia, Singapore and China are most likely to visit Experience Perth and Australia's South West, with only a small proportion venturing to Australia's Coral Coast; North West or Golden Outback. By contrast visitors from Germany, the USA and NZ are more likely to visit a range of regional destinations (TWA, 2017b). This highlights the importance of attracting visitors from diverse markets.

International and National Consumer Motivators

The process through which potential travellers choose a destination has been researched extensively. Literature by Crompton (1979) and Um and Crompton (1990) identified both push and pull factors associated with destination choice including: accessibility; needs satisfaction; and peer review. More recently, literature has examined the role of internal and external push and pull factors including destination marketing; distance and prices; climate; risk; familiarity; social media and airfares, all of which have been found to influence the choices of individual travellers, with the level of influence dependent on the circumstances and motivations of the individual (Sanders et al., 2016).

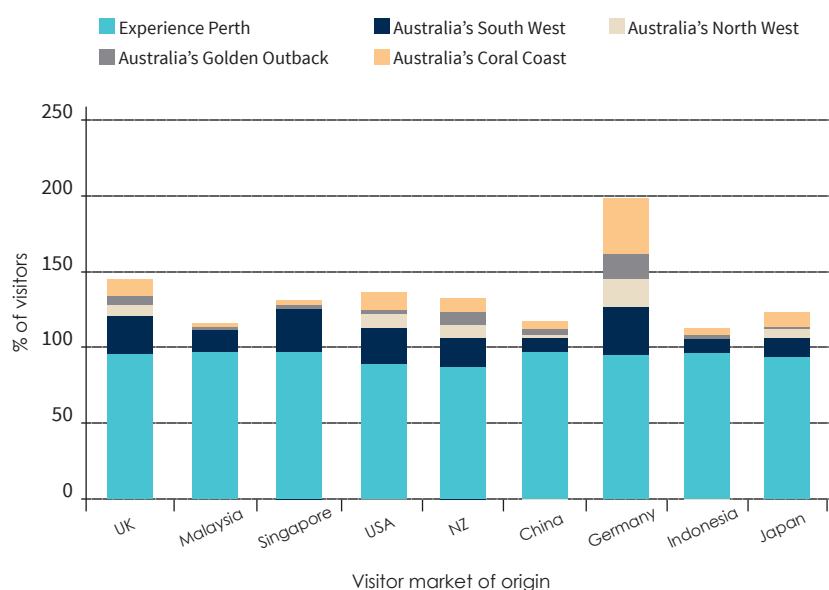
Extensive research has examined the impact of destination marketing on destination choice and traveller behaviour, determining that advertising can attract tourists and can also inspire travellers to extend their trip, change their travel plans and increase their expenditures while visiting a destination, with

Table 8: Visitor Purpose of Visit and Spend Characteristics by Visitor Country of Residence WA 2015

Country	Most Common Purpose of Visit	Average Spend Per Visitor
UK	VFR	\$2,084
Malaysia	Holiday	\$2,434
Singapore	Holiday	\$2,180
USA	Holiday	\$2,230
NZ	VFR	\$1,681
China	VFR	\$5,286
Germany	Holiday	\$2,517
Indonesia	VFR	\$2,198
Japan	Holiday	\$2,240

Data Source: TWA, 2017a

Figure 7: Regional Visitation by International Visitors by Country of Origin 2015



Data Source: TWA, 2017b

responses differing based on the marketing approach applied (Choe et al., 2017).

Distance and price have also been found to be key factors influencing destination choice by travellers world-wide, including Australian travellers (Sanders et al., 2016; Guillet, Lee, Law and Leung, 2011). However, the impact of these factors differs according to the travel needs, preferences and sensitivities of the individual (Nicolau and Mas, 2006).

For example, Nicolau (2012) determined that three-quarters of travellers are influenced by the loss aversion principle when making destination choices but that sensitivities differ, particularly in response to age, household size and marital status. As a result, the response to the price of a product is not linear and the research suggests exploring people's subjective price perceptions in the context of tourism packages in order to design effective promotional programs for destinations (Nicolau, 2012).

In Australia, price has been identified as a substantial factor influencing tourism choices and the trend for Australians to holiday overseas (Sanders et al., 2016). Sanders et al. (2016) also determined that the relative cost of domestic travel compared to international destinations such as Bali was the underlying reason for Australians not engaging in domestic travel. In addition, Lewis et al. (2010) identified that low cost airfares, the accumulation of annual leave, increased accessibility and the perception of overseas destinations being more exotic and prestigious than domestic destinations increased

the demand for outbound international travel.

Both studies also suggested that Australians perceive domestic travel as more appealing for family vacations or for travel later in life and therefore while Australian destinations cannot compete with many international destinations on price, they could appeal to families. There is also potential for destination marketing to work with the aspiration among Australians to travel around Australia later in life (Sanders et al., 2016; Lewis et al., 2010).

International Tourism Motivators

Yet, to assess WA's long-term competitiveness in the domestic and international tourism market, it is also important to understand the stated motivators for international and domestic travel to/within Australia.

Tourism Australia's Consumer Demand Project (2017) provides substantial research examining consumer markets in Australia and the factors that motivate consumers from markets around the world to travel to Australia. The research indicates that while the factors of importance to tourists when selecting a travel destination differ across tourism markets, on an aggregate basis the factors important to the highest proportion of consumers are safety and security; value for money; world class nature; good food and wine; and aquatic and coastal environments. In this context, Australia's reputation as a safe destination has been identified as a key advantage in attracting international tourists.

The Consumer Demand Project also indicates that while tourists from many countries aspire to

visit Australia and report an intention to visit Australia, actual rates of visitation are significantly lower. This is particularly evident in markets including China, South Korea, Japan and Italy, where aspirations and intentions to visit Australia translate into much smaller proportions of visitation in practice, indicating that there is considerable potential to increase visitors from these markets.

Examining perceptions of Australia, it is evident that international consumers associate Australia with natural beauty, aquatic and coastal wildlife experiences. Food and wine experiences are also considered important among international consumers, but currently consumers are less likely to identify Australia as a food and wine destination.

However, beaches have been identified as the number one Australian attraction, followed by Australian wildlife and the Great Barrier Reef as outlined in Figure 8. Festivals have also been identified as appealing to international visitors, with food and wine festivals being most attractive, while major sporting events have the biggest impact on destination choice.

The location of most major events in eastern states capitals and the distance of WA from eastern states attractions are likely to place WA at a disadvantage in attracting international visitors. However, WA's beaches, wildlife, unspoilt and sparsely populated natural wilderness and island experiences provide opportunities for tourism in Perth and other regions in the state.

Indigenous tourism experiences have also been identified as an opportunity for WA, with visitor

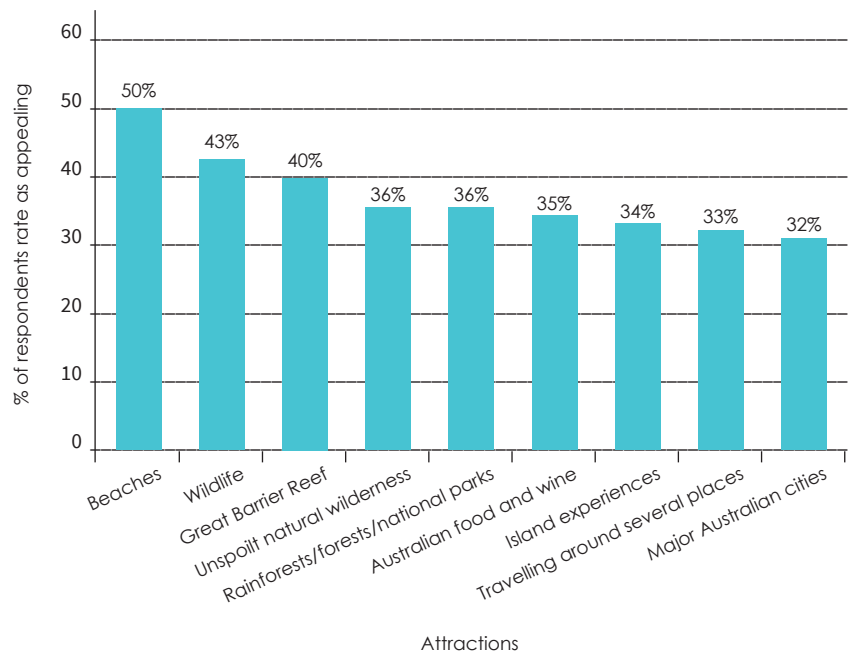
surveys identifying 78% of people who visited WA in 2015-16 were seeking an Aboriginal cultural experience, however only 24% reported experiencing Aboriginal culture (McDonald K, 2017).

Tourism Australia's Domestic Study, which examines drivers for domestic tourism, has established that travel in Australia by Australian residents is perceived to be "an opportunity to relax and rejuvenate from stress, as well as reconnect with friends and family" (TNS, 2015). It also found that Australians like "short, domestic holidays often – even after the experience of an international trip" (TNS, 2015 p. 1). The key motivators for interstate travel are outlined in Figure 9.

These findings are supported by a domestic travel survey undertaken by Griffith University on behalf of the City of Gold Coast. It found that Australians have a strong interest in food and wine experiences when on domestic holidays and that the mass domestic visitor market is seeking interactive cultural activities in the form of festivals and performances, instead of traditional cultural tourism experiences, such as visiting art galleries and museums. Both studies also identified a desire for quality accommodation options and found that domestic travellers are willing to pay more to access comfortable or luxury accommodation (TNS, 2015; TNS, 2016; Gardiner and Scott, 2015).

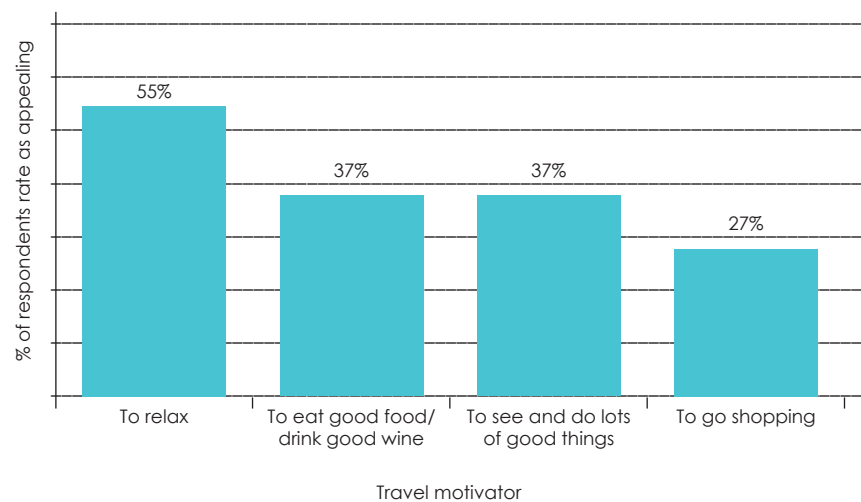
In this context, distance and travel time, which is similar or further than travel to some international destinations, combined with a lack of awareness of WA's attractions including food, wine and cultural events may act as barriers to the attraction of domestic interstate visitors.

Figure 8: Major Australian Attractions



Data Source: TA, 2017

Figure 9: Motivators for Interstate Travel



Data Source: TNS, 2015

Accessibility

Conditions in aviation markets including the frequency of flights and capacity for direct flights have been identified as influencing level of demand and visitation in WA (Tourism WA, 2015).

Domestically, Perth is accessible with regular, direct flights to Perth from all major Australian capitals. Direct interstate flights are also available to Broome from Brisbane (seasonal), Darwin, Melbourne or Sydney. However, in Australia accessibility is highest between the three major Eastern seaboard capitals of Sydney, Melbourne and Brisbane. Flights between these three cities accounted for 27% of all available seats and 29% of domestic passengers in 2015-16 (TRA, 2017).

Examining access from international markets, it is evident that Australia's two largest capitals, Sydney and Melbourne, are more accessible from key tourism markets worldwide due to a larger number and higher frequency of flights. Specifically, access to Perth from key markets such as China, New Zealand and the United States of America is lower than to eastern states capitals and this is likely to impact on visitor numbers from these markets. For example, in 2016 there were four direct flights from China to Perth per week compared to approximately 82 direct flights per week to Sydney; 54 direct flights to Melbourne; and 11 direct flights to Brisbane (Tourism Australia, 2017c).

Despite this, WA's geographic location means that it is relatively accessible to the state's largest visitor market, the UK. Accessibility to the UK is expected to increase with

the commencement of direct, Qantas operated Perth to London services in 2018. The state also benefits from geographic proximity and relatively high accessibility to Singapore, Malaysia and Indonesia.

Increasing aviation access has been identified as a priority for WA, however Perth's status as one of Australia's four designated 'international gateways' has been identified as disadvantaging Perth and limiting the opportunity to secure additional flights from international airlines, due to limitations negotiated with foreign governments in international air service agreements (TWA, 2016a). The need for new regional international airports in WA, such as in Broome and Busselton/ Margaret River, has also been identified as important to increase international and interstate access to regional areas (TWA, 2014).

Value for Money

Consumer research has identified value for money as a factor of high importance for international consumers when choosing a travel destination and, according to Tourism WA, during the resource sector boom Perth and Peel "gained a reputation for its accommodation being full, expensive and poor value for money" and "hoteliers also gained a reputation for not having the capacity to work with national and international travel distributors" (TWA, 2016a, p. 5). However, the recent slow-down in the resources sector has eased pressure on the accommodation sector and together with commitment to and construction of 2,000 new rooms in Perth with opening dates through to 2019 there is capacity for the region

to accommodate visitor growth (TWA, 2016a).

Infrastructure and Events

Events, including festivals and major sporting events, and infrastructure, including access, attractions and amenities, have also been identified as important to visitor attraction and satisfaction Perth and in WA. In Perth and Peel it is expected that recent investment in infrastructure projects including Elizabeth Quay; Perth City Link; the new Western Australian Museum; the upgrade of Perth Airport; the redevelopment of Crown Perth; and the revitalisation of Fremantle, Scarborough and Rottnest Island will provide positive benefits including increasing visitation to Perth and the state (TWA, 2016a).

According to Tourism WA, the new 60,000 seat Perth Stadium, which is due to open in 2018, will also play an important role as a visitor attractor by increasing WA's capacity to host major sporting and cultural events and generating large scale AFL visitation (TWA, 2016a).

Long-Term Competitiveness

The global tourism market is highly competitive and potentially volatile. Factors that influence and have the capacity to influence the performance of tourism destinations internationally include economic conditions, domestically and worldwide; natural disasters; terrorism; political instability; exchange rates; digitisation; and ageing populations worldwide (Ringbeck & Pietsch, 2013).

International research indicates that to maximise competitiveness and resilience in the global

tourism market, destinations require fundamental industry building blocks coupled with factors which differentiate the destination from its competitors (Pike & Page, 2014; Ringbeck & Pietsch, 2013).

Fundamental building blocks, or critical success factors for tourism destinations include an attractive environment; profitable industry; positive visitor experiences; ongoing investment in new products and infrastructure; a sustainable and supportive community; ease of access and effective industry organisation (Pike & Page, 2014; Ringbeck & Pietsch, 2013). As part of this, research indicates that a long-term view of competitiveness is imperative and requires resources which provide the destination with a comparative advantage over others, resources that differentiate and cannot be imitated, as well as effective destination management (Pike & Page, 2014; Ringbeck & Pietsch, 2013). Destination management includes the development of new attractions; infrastructure investment; and destination marketing/advertising which is sophisticated, multi-stakeholder and segmented to attract tourists from different markets (Pike & Page, 2014; Line and Wang, 2017; Ringbeck & Pietsch, 2013).

Conclusion

In conclusion, current data indicates that tourism is a growth sector in WA and there is potential for the economic contribution of tourism to increase, particularly given the recent slowdown in the resources sector. However, maximising the potential economic contribution of tourism hinges on maintaining international visitor growth; attracting a diverse profile of international and domestic visitors; and reducing the state's reliance on intrastate tourism and interstate business visitors.

This research also suggests that:

- WA has the fundamental building blocks needed for tourism growth and new developments in Perth CBD, as well as improved flight connections will provide opportunities for tourism growth in the Experience Perth region and the state.
- WA faces some key challenges associated with attracting more international and domestic visitors including price/affordability; distance; and accessibility; as well as competition with international destinations; and increased outbound international travel by Australian residents. Appropriate pricing and developing the short stay visitor market appear to be key factors influencing interstate leisure travel to the state.
- There is potential to increase the number and economic contribution of visitors to regional destinations, however factors such as distance and lower direct accessibility from interstate and international markets appear to impact on travel to regional WA.

- Visitor diversity (diversity of trip purpose, short and long- stay visitors and visitor origin) is important to maximise potential economic benefits and ensure the benefits of tourism are shared between regions and destinations in the state. There is a need to identify and develop strategies focused on the distinctive experiences offered by WA as well as the development of sophisticated, multi-stakeholder and segmented marketing approaches to attract both short and long-term visitors and visitors from diverse domestic and international markets.

References

- Australian Bureau of Statistics, 2016, 86350DO006_201516 Tourist Accommodation, Western Australia, 2015-16, Australian Bureau of Statistics Canberra
- Australian Bureau of Statistics, 2016a, 9503.0.55.001 - Tourism Region Maps and Allocation File, Australia, 2016, Western Australia, 2015-16, Australian Bureau of Statistics Canberra
- Choe, Yeongbae; Stienmetz, Jason L; Fesenmaier, Daniel R, 2017, Measuring Destination Marketing Comparing Four Models of Advertising Conversion, *Journal of Travel Research*, Vol.56(2), Page143-157, Sage Journals, Online: <http://journals.sagepub.com/doi/abs/10.1177/0047287516639161>, Retrieved 5 June 2017
- Deloitte 2013, Positioning for Prosperity, Catching the Next Wave, Deloitte , <https://www2.deloitte.com/au/en/pages/building-lucky-country/articles/positioning-for-prosperity.html>, Retrieved 12 May 2017

Gardiner and Scott, 2015, Australian Tourism Demand for Domestic Travel Experiences: Insights for the Gold Coast, Griffith Institute for Tourism Research Report Series Report No 7 August 2015, https://www.griffith.edu.au/__data/assets/pdf_file/0006/740805/Experiences-Research-Domestic-Report-7.pdf, Retrieved 14 May 2017

Guillet Basak Denizci, Lee Andy, Law Rob and Leung Rosanna, 2011, Factors Affecting Outbound Tourists' Destination Choice: The Case of Hong Kong, *Journal of Travel and Tourism Marketing*, Volume 28, 2011, Issue 5, Pages 556-566, Taylor and Francis Online, <http://www.tandfonline.com/doi/abs/10.1080/10548408.2011.588120?journalCode=wttm20>, Retrieved 6 June 2017

Line, Nathaniel D; Wang Youcheng, 2017, A multi-stakeholder destination oriented approach to destination marketing, *Journal of Destination Marketing & Management*, Vol.6(1), Page 84-93, Elsevier Ltd, <http://www.sciencedirect.com/science/journal/2212571X>, Retrieved 6 June 2017

McDonald K, 2017, Connecting the Indigenous Experience, *Business News*, 13 March 2017, <https://www.businessnews.com.au/article/Connecting-the-indigenous-experience>, Retrieved 14 May 2017

Nicolau Juan L, Mas, 2006, The influence of distance and prices on the choice of tourist destinations: The moderating role of motivations, *Tourism Management*, Volume 27 (5), Pages 982-996, Elsevier B.V., <http://www.sciencedirect.com/science/journal/02615177/27/5>, Retrieved 7 June 2017

Nicolau Juan L, 2012, Asymmetric Tourist Response to Price Loss Aversion Segmentation, *Journal of Travel Research*, Volume 51.2012, 5, Pages 568-576, Sage, <http://journals.sagepub.com/doi/abs/10.1177/0047287511431321>, Retrieved 7 June 2017

Perth Airport, 2017, Perth Airport Corporate, Airport Statistics, <https://www.perthairport.com.au/Home/corporate/about-us/airport-statistics>, Retrieved 8 June 2017

Pham Tien; Jago Leo; Spurr Ray and Marshall Justin, 2015, The Dutch Disease effects on tourism – The case of Australia, *Tourism Management*, Volume 46, Pages 610–622, Elsevier B.V., <http://www.sciencedirect.com/science/journal/02615177/46>, Retrieved 7 June 2017

Pike, Steven; Page, Stephen J, 2014, Destination Marketing Organizations and destination marketing: A narrative analysis of the literature, *Tourism Management*, Volume 41, Pages 202-227, Elsevier B.V., <http://www.sciencedirect.com/science/journal/02615177/27/5>, Retrieved 6 June 2017

Ringbeck & Pietsch, 2013, How to Succeed as a Tourism Destination in a Volatile World, *The Travel & Tourism Competitiveness Report 2013*, 2013 World Economic Forum, http://www3.weforum.org/docs/TTCR/2013/TTCR_Chapter1.2_2013.pdf, Retrieved 12 May 2017

Sanders Dale, Wilson Greg, Susomrith Pattanee, Dowling Ross, Fly in to work; fly out to Bali: An exploration of Australian fly-in-fly-out (FIFO) workers leisure travel, *Journal of Hospitality and Tourism Management*, Volume 26, March 2016, Pages 36–44, Elsevier Ltd, <http://www.sciencedirect.com/science/article/pii/S1447677015300450>, Retrieved 7 June 2017

Tourism Australia, 2017, Consumer Demand Project Fact Sheet, Tourism Australia, http://www.tourism.australia.com/documents/Markets/CDP_Fact_Sheets_-_2017_updated_set.pdf, Retrieved 12 May 2017

TNS, 2015, Domestic 2015 Fact Sheet, <http://www.tnsaustralia.com/domestic2015/domestic-fact-sheet-2015.pdf>, Retrieved 12 May 2017

TNS, 2016, Domestic 2016 Fact Sheet, <http://tnsaustralia.com/links/263103435%20Domestic%20Fact%20Sheet%20TNS%20130416.pdf>, Retrieved 12 May 2017

Tourism Western Australia, 2012, Domestic Visitor Fact Sheet 2011-12, Tourism Western Australia, Perth, Retrieved 8 May 2017

Tourism Western Australia, 2014, Tourism WA Submission to Productivity Commission Research Paper – Australia's International Tourism Industry, Productivity Commission, <http://www.pc.gov.au/research/completed/international-tourism/comments/submissions/submission-counter/sub008-international-tourism.pdf>, Retrieved 10 March 2017

Tourism Research Australia, 2015, National Visitor Survey December 2015, Tourism Research Australia, Canberra, Retrieved 2 May 2017

Tourism Research Australia, 2016, Tourism Satellite Accounts 2014-15 Full Report, Tourism Research Australia, Canberra, Retrieved 5 May 2017

Tourism Research Australia, 2016a, Outbound Tourism Statistics, Australian Residents Outbound Trips, Tourism Research Australia, Canberra, Retrieved 8 June 2017

Tourism Research Australia, 2017, State of the Industry 2017, Tourism Research Australia, Canberra, Retrieved 3 May 2017

Tourism Research Australia, 2017a, International Visitor Survey December 2016 Quarterly Results, Tourism Research Australia, Canberra, Retrieved 3 May 2017

Tourism Research Australia, 2017b, National Visitor Survey December 2016 Quarterly Results, Tourism Research Australia, Canberra, Retrieved 5 May 2017

Tourism Research Australia, 2017c, China Market Profile 2017a, Tourism Australia, [http://www.tourism.australia.com/documents/Markets/TAS111145_Market_Profiles_2017_China_Full-V5\(1\).pdf](http://www.tourism.australia.com/documents/Markets/TAS111145_Market_Profiles_2017_China_Full-V5(1).pdf), Retrieved 6 May 2017

Tourism Research Australia, 2017d, National Visitor Survey March 2017 Quarterly Results, Tourism Research Australia, Canberra, Retrieved 25 June 2017

Tourism Research Australia, 2017e, International Visitor Survey March 2017 Quarterly Results, Tourism Research Australia, Canberra, Retrieved 26 June 2017

Tourism Research Australia, 2017f, Tourism Satellite Accounts 2015-16 Full Report, Tourism Research Australia, Canberra, Retrieved 3 June 2017

Tourism Western Australia, 2015, Tourism Satellite Account Western Australia Fact Sheet 2013-14, Tourism Western Australia, Perth, Retrieved 10 May 2017

Tourism Western Australia, 2016, Tourism Satellite Account Western Australia Fact Sheet 2014-15, Tourism Western Australia, Perth, Retrieved 10 March 2017

Tourism Western Australia, 2016a, Annual Report, Tourism Western Australia, Perth, Retrieved 5 May 2017

Tourism Western Australia, 2017, Domestic Visitation Fast Facts Year Ending March 2017, Tourism Western Australia, Perth, Retrieved 19 July 2017

Tourism Western Australia, 2017a, International Visitation Fast Facts Year Ending March 2017, Tourism Western Australia, Perth, Retrieved 19 July 2017

Tourism Western Australia, 2017b, International Market Profiles YE December 2015, Tourism Western Australia, Perth, Retrieved 19 July 2017

Tourism Western Australia, 2017c, Tourism Satellite Account Western Australia Fact Sheet 2015-16, Tourism Western Australia, Perth, Retrieved 3 June 2017

Appendix A – Map of Tourism Regions



Tourism Regions, Western Australia, 2016

Based on ASGS 2016 edition



© Commonwealth of Australia, 2016
Source: Australian Statistical Geography Standard (ASGS) Edition 2016

Source: ABS, 2016a

About FACTBase

FACTBase is a collaborative research project between the Committee for Perth and The University of Western Australia to benchmark the liveability of Perth and its global connectedness through an examination of Perth's economic, social, demographic and political character.

The FACTBase team of academics and researchers condense a plethora of existing information and databases on the major themes, map what is happening in Perth in pictures as well as words, and examine how Perth compares with, and connects to, other cities around the world.

Copyright

This paper is the copyright of The University of Western Australia and the Committee for Perth. While we encourage its use, it should be referenced as:

Davis, G. (2017) *Sizing Tourism in Western Australia*, FACTBase Bulletin 55, The University of Western Australia and the Committee for Perth, Perth.

About the author



Gemma is a research, policy and strategic planning professional with 19 years of experience working in Australia, New Zealand and the Republic of Ireland. Gemma is a consultant for the Committee for Perth and was recently employed by the Committee as Manager of Research and Strategy. Gemma is currently a Director with Davis Consulting Group in New Zealand and is an Honorary Research Fellow with The University of Western Australia. Gemma has authored major reports for the Committee for Perth including the Get a Move On! project.

Thanks to our members for their enduring contribution to securing a brighter future for the Perth region.

View all of our members at: www.committeeforperth.com.au

Committee for Perth Disclaimer

The information contained in this publication is provided for information purposes only and is not intended to address the circumstances of a particular individual or entity. Unless otherwise stated, the information has been drawn from a number of sources current as at the date of this publication. To the extent this publication contains any statement as to a future matter, that statement is provided based on the information available to the Committee as at the date of this publication. The Committee is not under any obligation to update any information contained in this publication. No representation or warranty, express or implied, is made by the Committee as to the completeness, accuracy, reliability, currency or correctness of the information. While the Committee has made all reasonable efforts to ensure the accuracy of the information, to the maximum extent permitted by law, the Committee and any party involved in creating or producing this publication and each of their officers, directors, employees, agents and advisers expressly disclaim any responsibility for the accuracy or completeness of the material in this publication and exclude all liability (however caused, including by negligence) for any loss or damage arising from any use of or reliance on the information, including any error or omission there from, or otherwise arising in connection with it. No one should rely on this information as a substitute for professional advice.