



Quarterly Visitor Snapshot Year Ending March 2012

Prepared by Research
Tourism Western Australia

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PLEASE NOTE:

Changes to International and National Visitor Survey Data

Tourism Regions

In December 2010 the Australian Bureau of Statistics (ABS) released the Australian Statistical Geography Standard (ASGS). This new geographical standard is based on population and replaces the previous Australian Statistical Geography Classification (ASGC) that was based on legal boundaries. The ASGS took effect from 1 July 2011.

This change required the Tourism Regions to be redefined under the ASGS classification. Tourism Research Australia (TRA) in consultation with the state and territory tourism offices and the ABS completed this review in June 2011. The new geographical structure for the Tourism Regions was published in the Non-ABS Structures publication [1270.0.55.003 - Australian Statistical Geography Standard \(ASGS\): Volume 3 - Non ABS Structures, July 2011](#) on 22 July 2011. The publication contains the digital boundaries, labels and codes for the tourism regions.

To preserve time series data for the International and National Visitor Surveys, TRA undertook an extensive back casting exercise during 2011/12. All IVS and NVS data back to 1999 has been converted to the new ASGS classification enabling users to continue to use the full time series for trend analysis and comparative purposes at the regional level.

Weighting Methodology – International Visitor Survey

The IVS results are benchmarked to data on international visitor numbers over the period, provided by the Department of Immigration and Citizenship (DIAC), with the assistance of the ABS. The variables used in weighting the data are country of residence, state of arrival, main purpose of journey, airport of departure and age and sex of visitor.

Whilst TRA was completing the back casting it was able to make further improvements to the survey methodology by weighting the education and employment categories separately. This change will see improved survey results in terms of accuracy for both of these categories. Previously due to restrictions in sample size the education and employment categories were weighted together. With large growth in the education sector over recent years this methodology produced results that overstated education and understated employment.

Weighting Methodology – National Visitor Survey

The NVS results are benchmarked to the estimated resident population aged 15 years and over as provided by the ABS. Weights for the NVS are calculated on an individual trip basis. They take into account the age, sex and place of origin of the respondent, the size of the household in which they live, month of travel, the recall period applicable to the trip (for example, 7 days for day trips, 28 days for overnight trips and 3 months for overseas trips) and the number of interviews with a return date in this recall period.

From 2012 onwards the NVS will be benchmarked against an improved set of population estimates provided by the ABS. To maintain the time series TRA implemented and back cast updated population estimates. The changes made to the methodology will produce improved estimates and increase stability in the time series including more stable tourism region boundaries.

Business Expenditure – National Visitor Survey

During 2010 TRA became aware of some instances of missing expenditure for business travellers in the NVS overnight survey. The issue was caused by a missing prompt in the overnight interview file. With the back casting exercise being undertaken TRA took the opportunity repair the interview file and also impute for these missing values. The imputation included back casting for previous years to 2003.

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Market Overviews

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Domestic Market Overview

Intrastate

Overnight

- Between 2007/2008 and 2010, intrastate visitation figures showed significant and continuous decline. In the last couple of years intrastate figures for WA have seen improvement, with spend, visitor numbers and nights increasing at a faster rate than the national average.
- Intrastate overnight visitation is now back to the 2009 level, with some way to go before it again hits the 2007/2008 peaks.
- YE March 2012 saw intrastate visitor numbers within Western Australia (WA) grow (+) 13.2%, which is higher than the national average of (+) 8.5%. This is equivalent to an estimated increase of (+) 570,000 intrastate trips in WA.
- Western Australians are spending more in WA, with intrastate spend up (+) 10.4% for YE March 2012, which is equivalent to a \$217 million increase. Again, the increase in spend is greater than the national average of (+) 9.6%.
- WA's largest intrastate overnight visitor segment, the holiday/leisure segment, showed growth of (+) 8.1% with (+) 165,000 more trips. Growth for this segment is ahead of the national average of (+) 3.8%. The visiting friends and relatives (VFR) segment also grew (+) 14.6%.
- YE March 2012 has seen the largest growth in intrastate business visitors (+29.3%) with (+) 216,000 more trips. This is up significantly from last quarter (+9.2% for YE December 2011) and is ahead of the national average of (+) 11.1%.

Outbound

- Western Australians are also travelling out of the country in increasing numbers. ABS data shows that outbound passenger movement from WA for leisure grew (+) 12.8% for YE March 2012 in comparison to YE March 2011. Over the last three years the annual average growth rate was (+) 14.9%.

Daytrip

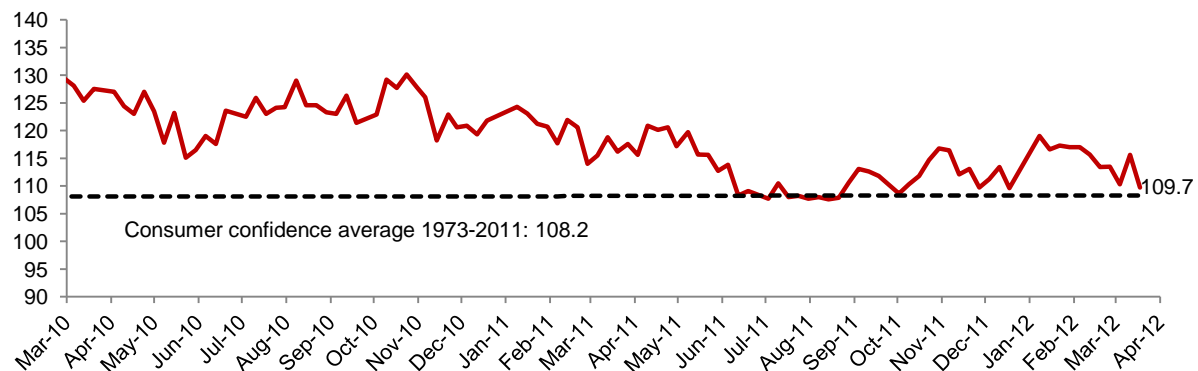
- Intrastate daytrip visitor numbers for YE March 2012 grew (+) 10.6%, which is higher than the national average of (+) 6.6%. This is equivalent to an estimated increase of (+) 1,357,000 intrastate daytrips in WA.
- The daytrip 'other' segment has seen significant growth (+39.4%), driven primarily by personal appointment/business travel (+56.4% or 284,000 additional trips) and health-related travel (+32.9% or 197,000 additional trips).
- The VFR segment also grew (+6.7%) with (+) 252,000 more trips.
- Daytrip spend is also up (+) 18.9%, equivalent to \$234 million increase in spend.

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Interstate

- The NVS shows WA experienced growth in interstate visitor spend of (+) 31.8% and visitor numbers, up (+) 11.2% for YE March 2012. This is a significant uplift in visitors compared to last quarter (-2.0% for YE December 2011). Visitor nights only grew (+) 2.0% during YE March 2012 resulting in a lower average length of stay over the previous year (7.6 nights vs. 8.3 nights).
- Growth in interstate tourism was driven by the interstate business segment up (+) 26.8% in visitation (or 110,000 additional business visitors). Additionally the interstate VFR market reverted from a decline of (-) 9.9% in YE December 2011 to current growth of (+) 14.3%.
- YE March 2012 saw declines in interstate holiday/leisure travel of (-) 12.3%, easing from significant declines of (-) 19.2% for YE December 2011.
- Interstate passenger traffic continues to grow through Perth Airport with an (+) 8.2% increase at YE March 2012 over YE March 2011. It should however be recognised that the airport figures include Fly-in Fly-out (FIFO) passengers on commercial flights.
- It should be noted that the interstate estimates are based on smaller sample sizes than either the intrastate or international measures, and can fluctuate quite significantly. Hence the use of other statistics, such as those from the Perth Airport, to make comparison. The likely visitation levels fall somewhere between the Perth Airport and NVS figures.

Australian Consumer Confidence, 18 March 2012 – The Roy Morgan Consumer Confidence Monitor¹



¹ Roy Morgan Research: Consumer Confidence (n=1,000 interviews per week)

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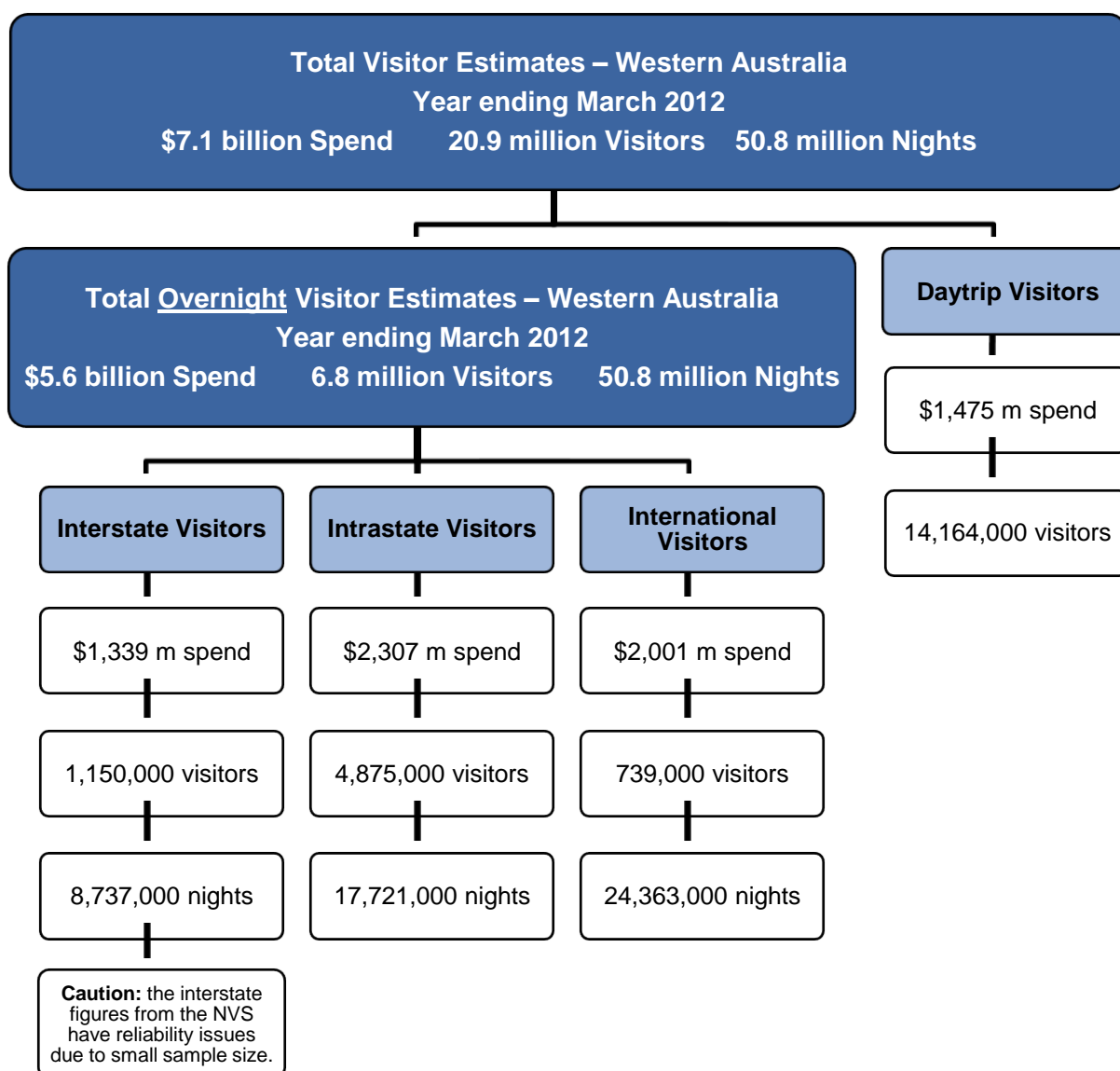
International Market Overview

- WA experienced growth across the main international measures for YE March 2012 (i.e. visitor numbers, nights and spend).
- 739,000 international visitors came to WA in YE March 2012; an increase of (+) 3.5% for WA, ahead of the national average growth rate of (+) 1.1%. While year on year growth is up, the overall growth rate has flattened somewhat in the last quarter (+4.8% growth recorded for YE December 2011).
- YE March 2012 has seen WA's largest international visitor segment, the holiday/leisure segment, take a downturn (-5.0% or 16,900 fewer visitors).
- The VFR segment grew (+) 3.3% for YE March 2012 while business visitors to WA grew (+) 9.0%.
- The international 'other' segment has seen significant growth (+41.3%), driven primarily by international employment (+47% or 17,300 additional visitors) and working holiday visitors (+36% or 8,000 additional visitors).
- Looking at source markets, large growth in visitation is evident from Ireland (+) 35.0%, New Zealand (+) 19.9%, Korea (+) 19.8%, China (+) 13.1% and Indonesia (+) 12.9%.
- International visitors spent 24.4 million nights in WA, up (+) 9.7% and greater than the national average growth rate of (+) 5.5%. This represents an increase in average length of stay from YE December 2011 (33 nights vs. 31 nights).
- Similar to the increase in visitors, the growth in visitor nights is due to working holiday and employment visitors staying longer in WA (+57% or 1,337,200 additional nights and +25% or 806,800 additional nights respectively).
- International visitors spent more in WA during YE March 2012, with spend growing (+) 7.1% over YE March 2011.
- Most notable increases in spend were seen from Ireland (+) 84.6% (+\$47m), China (+) 35.6% (+\$36m), New Zealand (+) 29.0% (+\$31m) and Korea (+) 43.3% (+\$13m).

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Overview of Key Measures¹

- **Total visitors to/within WA (overnight and intrastate daytrip visitors):** 20.9 million visitors came to or travelled within WA during YE March 2012, (+) 11.0% or 2 million additional visitors than YE March 2011. These visitors spent \$7.1 billion in the State, a growth of (+) 14.6% or \$906 million more than last year.
- **Overnight visitors to/within WA:** 6.8 million overnight visitors came to or travelled within WA during YE March 2012, (+) 11.7% or 711,200 additional visitors than YE March 2011. These overnight visitors spent \$5.6 billion, a growth of (+) 13.5% or \$672 million more than last year.



¹ **Tourism Research Australia** – National Visitor Survey; International Visitor Survey (estimates of visitors aged 15+ years). Note that estimates on this page are based on survey data and need to be considered within these Confidence Intervals:
Intrastate CI: Spend ± 4.7%, Visitors ± 6.5%, Nights ± 10.4%
Interstate CI: Spend ± 4.7%, Visitors ± 12.4%, Nights ± 14.1%
International CI: Spend ± 5.8%, Visitors ± 5.6%, Nights ± 8.6%

Please note: The National and International Visitor Surveys are based on different survey methodologies. The IVS is a face to face survey with international visitors at airport departure lounges across Australia. The NVS is a random telephone survey with residents across Australia.

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The Intrastate Market

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Outbound Departures – Western Australian Residents

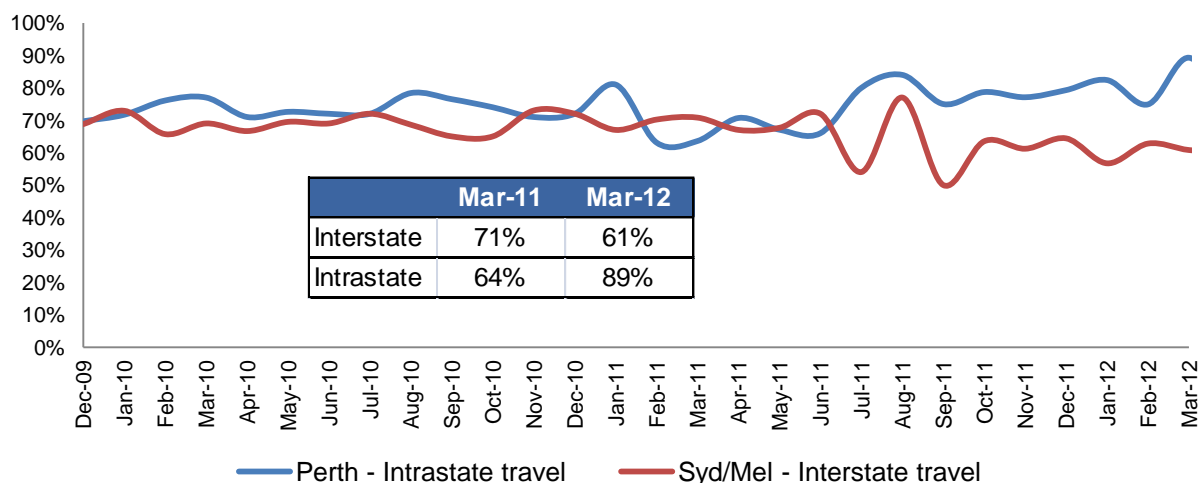
Outbound Estimates	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [▲]
International (ABS data)¹				
Trips (all purpose)	1,052,290	1,170,300	11.2%	11.4%
Trips (leisure)	688,420	776,530	12.8%	14.9%
Interstate				
Estimated Trips (NVS Data) ²	982,000	1,152,000	17.3%	15.4%
Estimated Outbound Trips (Perth Airport data) ³	1,295,200	1,401,600	8.2%	6.8%

Note: Trips based on Perth Airport data assumes a plane is 50/50 travel/return and 50/50 visitor/outbound - therefore a quarter all passengers are estimated to be outbound.

Domestic Travel Intentions (Tourism WA's Brand Tracking data)

- Tourism WA conducts continuous brand tracking research in the domestic market, with a question asking intention to travel to or within Western Australia.
- Intrastate travel intention has remained high, while interstate travel intention is lower than the level measured in March 2011.
- Tourism WA continues to work with operators on cooperative marketing campaigns that include tactical offers to encourage travel within Western Australia.

Domestic Travel Intentions – March 2012⁴



¹ ABS – Overseas Arrivals and Departures

² Tourism Research Australia – National Visitor Survey (Visitors aged 15+ years)

³ Perth Airport Pty Ltd

⁴ Tourism WA Brand Tracker (Q: In the next 12 months, how likely are you to travel for a holiday or break in ...?) March 2012: Perth n=200, Sydney/Melbourne n=403

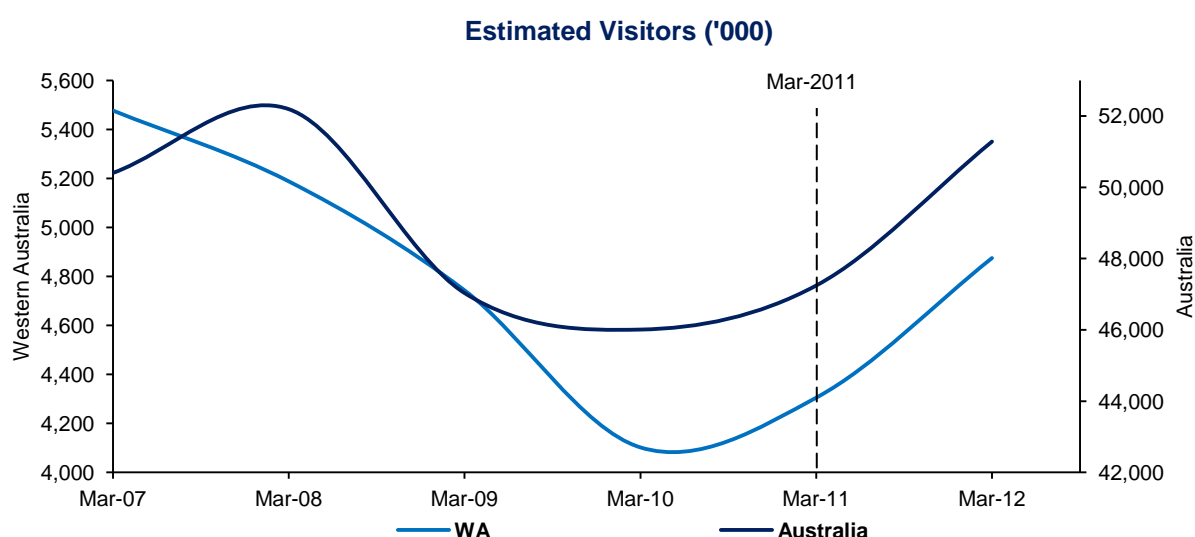
[▲] AAGR = Average Annual Growth Rate

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Intrastate Overnight Visitor Estimates – National Visitor Survey (NVS)¹

- Between 2007/2008 and 2010, intrastate visitation figures showed significant and continuous decline. In the last couple of years intrastate figures for WA have seen improvement, with spend, visitor numbers and nights increasing at a faster rate than the national average.
- Intrastate overnight visitation is now back to the 2009 level, with some way to go before it again hits the 2007/2008 peaks.
- YE March 2012 saw intrastate visitor numbers within Western Australia (WA) grow (+) 13.2%, which is higher than the national average of (+) 8.5%. This is equivalent to an estimated increase of (+) 570,000 intrastate trips in WA.
- Western Australians are spending more in WA, with intrastate spend up (+) 10.4% for YE March 2012, which is equivalent to a \$217 million increase. Again, the increase in spend is greater than the national average of (+) 9.6%.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Spend (\$m)	\$2,090	\$2,307	10.4%	N/A
Visitors	4,305,000	4,875,000	13.2%	9.0%
Nights	16,000,000	17,721,000	10.8%	9.0%
Australia				
Spend (\$m)	\$18,477	\$20,243	9.6%	N/A
Visitors	47,242,000	51,278,000	8.5%	5.6%
Nights	143,366,000	158,755,000	10.7%	5.1%



¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 3,737 Western Australian residents.

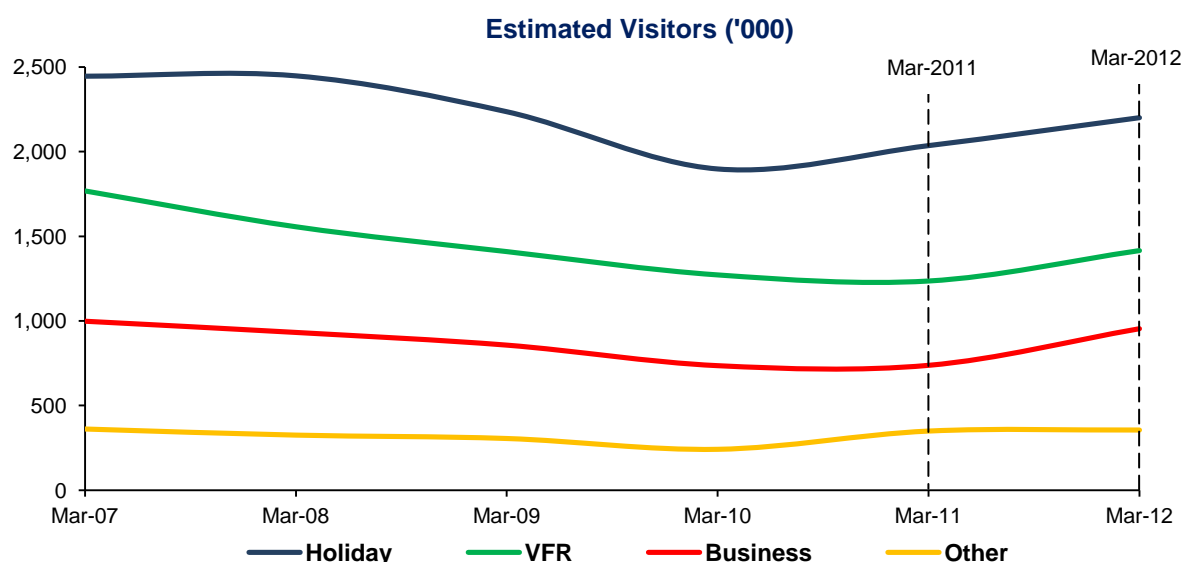
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Purpose of Visit – Intrastate Overnight Visitor Estimates (NVS)¹

- WA's largest intrastate overnight visitor segment, the holiday/leisure segment, showed growth of (+) 8.1% with (+) 165,000 more trips. Growth for this segment is ahead of the national average of (+) 3.8%.
- The visiting friends and relatives (VFR) segment grew (+) 14.6% or (+) 180,000 more trips.
- YE March 2012 has seen the largest growth in intrastate business visitors (+29.3%) with (+) 216,000 more trips. This is up significantly from last quarter (+9.2% for YE December 2011) and is ahead of the national average of (+) 11.1%.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA Intrastate Visitors				
Holiday or leisure	2,036,000	2,201,000	8.1%	7.7%
Visiting friends and relatives	1,235,000	1,415,000	14.6%	5.5%
Business	738,000	954,000	29.3%	13.9%
Other*	350,000	356,000	1.7%	21.3%
Australian Intrastate Visitors				
Holiday or leisure	22,103,000	22,948,000	3.8%	2.1%
Visiting friends and relatives	15,709,000	18,017,000	14.7%	8.3%
Business	6,932,000	7,702,000	11.1%	8.4%
Other*	2,994,000	3,298,000	10.2%	10.7%



¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 3,737 Western Australian residents.

[^] AAGR = Average Annual Growth Rate

* Other includes: education (mostly students), employment or leisure (e.g. working holiday), health-related, in transit (passing through), provided transport etc.

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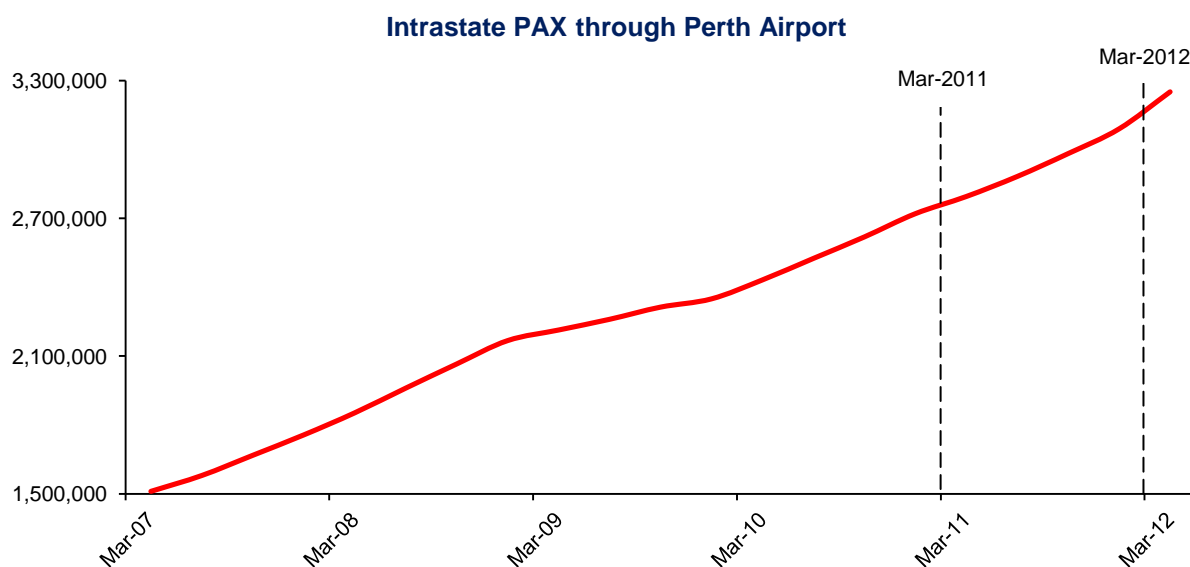
Western Australian Airports – Intrastate Passengers (PAX)

- Intrastate passenger numbers through Perth and Kalgoorlie airports have grown in the last 12 months however Broome airport has shown a slight decline.
- Long term trends show a steady increase in intrastate PAX though Perth Domestic Airport (see graph below).
- Intrastate passenger movement (including inbound and outbound) through Perth Airport shows an increase of (+) 16.3% for YE March 2012 in comparison to YE March 2011.

Top Intrastate Routes in Western Australia (PAX)¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Perth (All Intrastate PAX ^{**})	2,795,300	3,251,600	16.3%	15.6%
Broome (All Revenue PAX ^{***})	323,300	309,600	-4.2%	-1.8%
Kalgoorlie (All Revenue PAX ^{***})	232,500	242,200	4.2%	8.5%

Perth Airport Intrastate PAX



¹ BITRE Domestic City Pairs (Top 50 domestic routes) and Perth Airport Pty Ltd.

[^] AAGR = Average Annual Growth Rate

^{**} PAX = Total passengers (arrivals and departures)

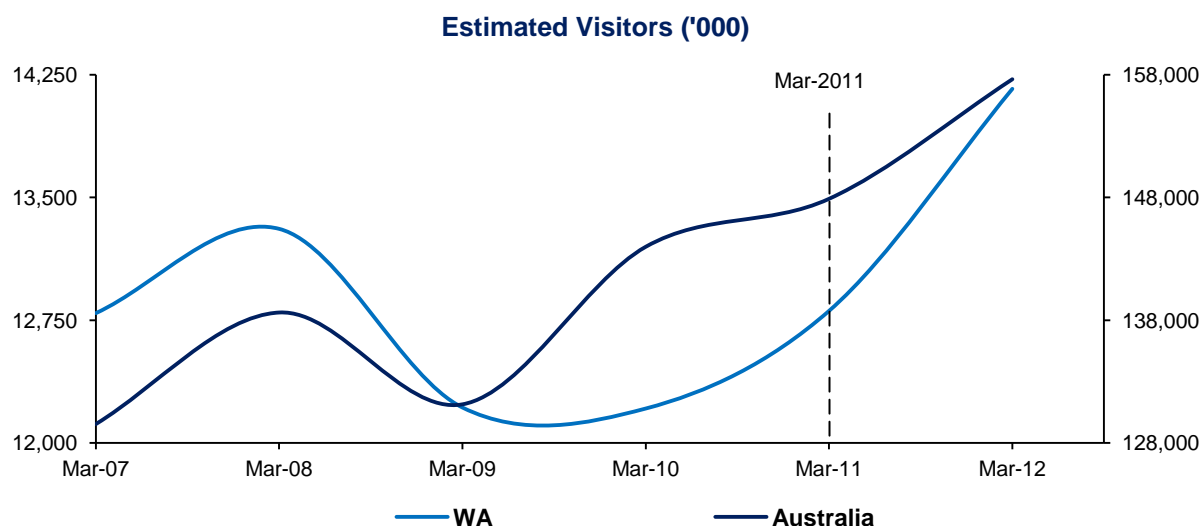
^{***} Revenue PAX = Total passengers (arrivals and departures), but excluding non-fare paying passengers.

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Intrastate Daytrip Visitor Estimates – National Visitor Survey (NVS)¹

- Intrastate daytrip visitor numbers for YE March 2012 grew (+) 10.6%, which is higher than the national average of (+) 6.6%. This is equivalent to an estimated increase of (+) 1,357,000 intrastate daytrips in WA.
- Daytrip spend is also up (+) 18.9%, equivalent to \$234 million increase in spend.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Spend (\$m)	1,241	1,475	18.9%	N/A
Visitors	12,807,000	14,164,000	10.6%	7.7%
Australia				
Spend (\$m)	15,327	17,105	11.6%	N/A
Visitors	147,892,000	157,645,000	6.6%	4.6%



¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 2,846 Western Australian residents.

[^] AAGR = Average Annual Growth Rate

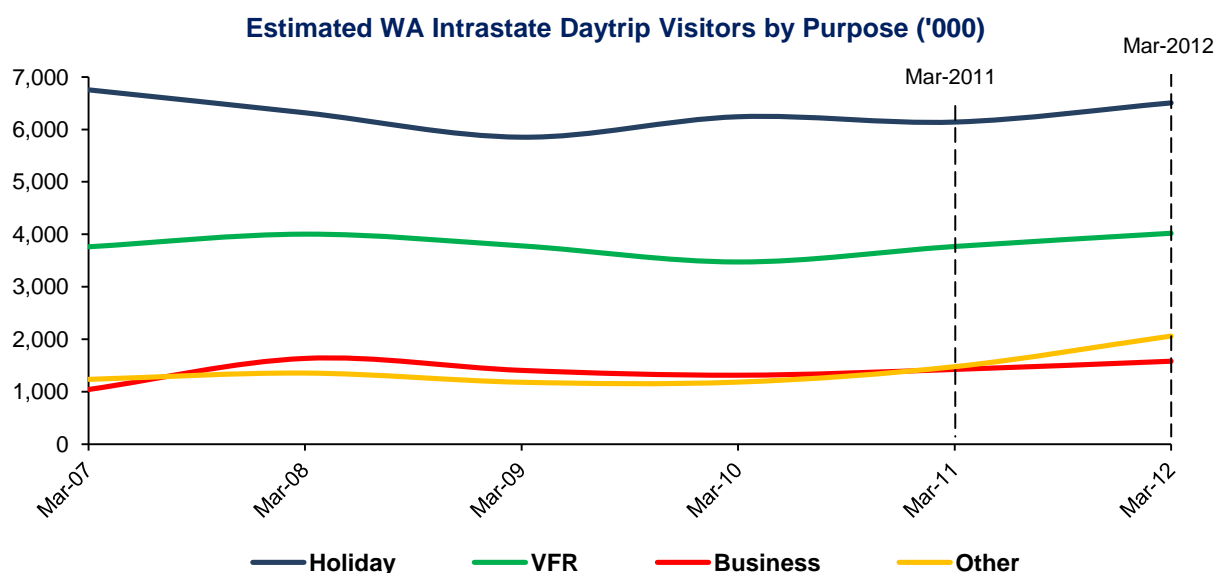
* Other includes: education (mostly students), employment or leisure (e.g. working holiday), health-related, in transit (passing through), provided transport etc.

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Purpose of Visit – Intrastate Daytrip Visitor Estimates (NVS)¹

- The daytrip 'other' segment has seen significant growth (+39.4%), driven primarily by personal appointment/business travel (+56.4% or 284,000 additional trips) and health-related travel (+32.9% or 197,000 additional trips).
- The VFR segment also grew (+6.7%) with (+) 252,000 more trips.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA Daytrip Visitors				
Holiday or leisure	6,140,000	6,506,000	6.0%	2.1%
Visiting friends and relatives	3,766,000	4,018,000	6.7%	7.6%
Business	1,423,000	1,580,000	11.0%	9.7%
Other*	1,478,000	2,060,000	39.4%	31.8%
Australian Daytrip Visitors				
Holiday or leisure	71,569,000	73,318,000	2.4%	0.3%
Visiting friends and relatives	44,767,000	46,677,000	4.3%	6.4%
Business	14,157,000	17,109,000	20.9%	12.1%
Other*	17,399,000	20,541,000	18.1%	12.5%



¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 2,846 Western Australian residents.

[^] AAGR = Average Annual Growth Rate

* Other includes: education (mostly students), employment or leisure (e.g. working holiday), health-related, in transit (passing through), provided transport etc.

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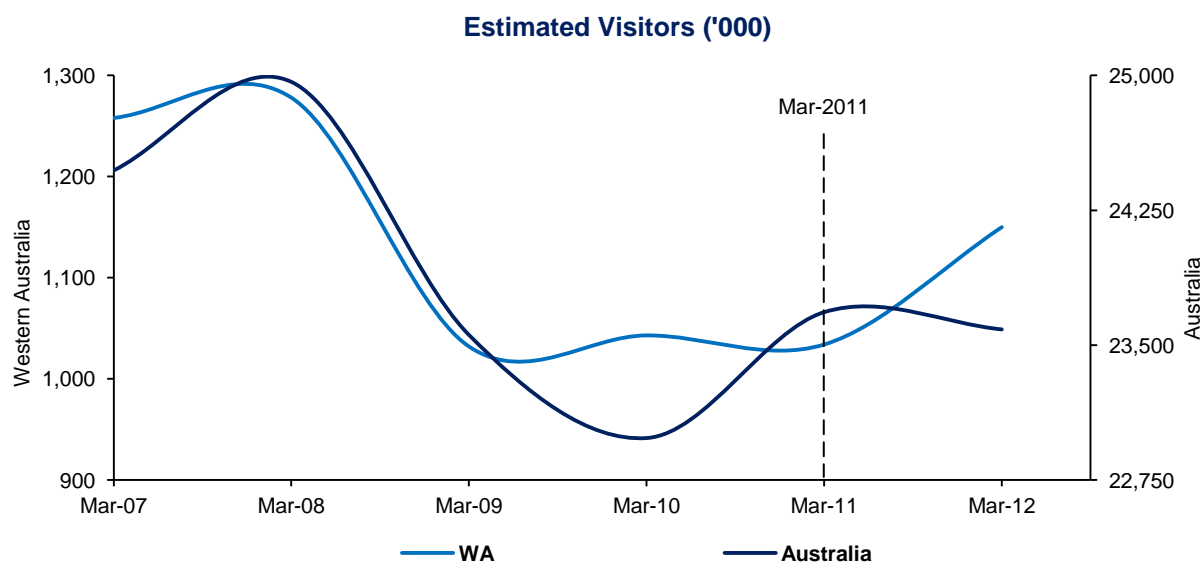
The Interstate Market

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Interstate Overnight Visitor Estimates – National Visitor Survey (NVS)¹

- The NVS shows WA experienced growth in interstate visitor spend of (+) 31.8%.
- YE March 2012 saw interstate visitor numbers grow, up (+) 11.2%. This is a significant uplift compared to last quarter (-2.0% for YE December 2011).
- Visitor nights only grew (+) 2.0% during YE March 2012 resulting in a lower average length of stay over the previous year (7.6 nights vs. 8.3 nights).
- The NVS interstate overnight visitor estimates remain volatile (see trend graphs below), and so should be read alongside other data sources such as the Perth Airport passenger data.
- Interstate passenger numbers through Perth Airport has continued to grow for YE March 2012, at (+) 8.2% over the previous year (see following pages).

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 year AAGR [^]
WA				
Spend (\$m)	\$1,016	\$1,339	31.8%	N/A
Visitors	1,034,000	1,150,000	11.2%	5.0%
Nights	8,563,000	8,737,000	2.0%	5.4%
Australia				
Spend (\$m)	\$17,917	\$19,350	8.0%	N/A
Visitors	23,683,000	23,587,000	-0.4%	1.3%
Nights	119,667,000	120,371,000	0.6%	0.6%



¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 553 Australian residents.

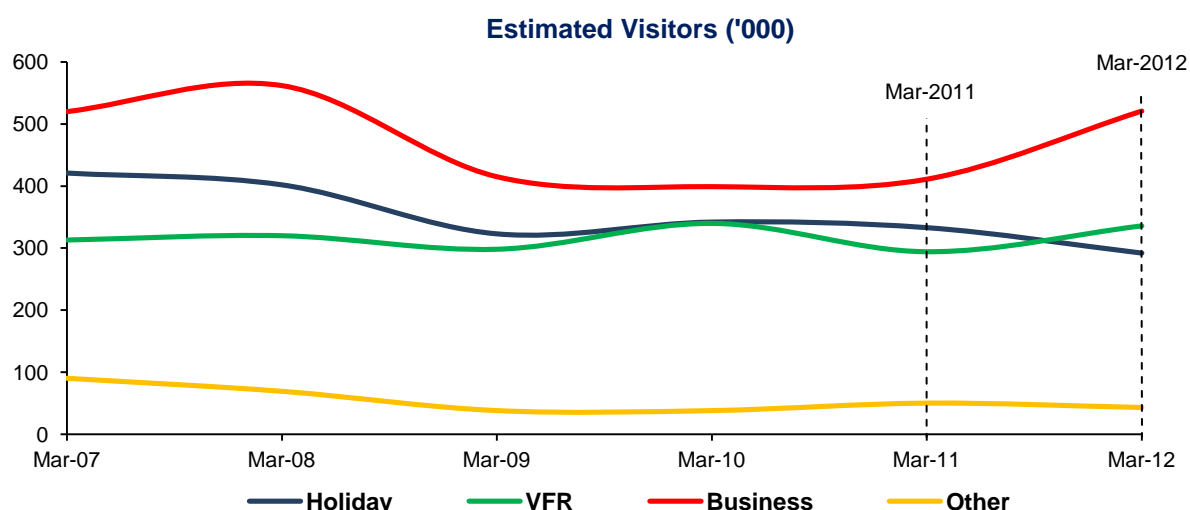
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Purpose of Visit - Interstate Overnight Visitor Estimates (NVS)¹

- Growth in interstate tourism was driven by the interstate business segment up (+) 26.8% in visitation (or 110,000 additional business visitors).
- The interstate VFR market reverted from a decline of (-) 9.9% in YE December 2011 to current growth of (+) 14.3%.
- YE March 2012 saw declines in interstate holiday/leisure travel of (-) 12.3%, easing from significant declines of (-) 19.2% for YE December 2011.
- Increasing business travellers' contribution to the leisure tourism industry is a key element of the *State Government's Strategy for Tourism in WA*.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 year AAGR [^]
WA Interstate Visitors				
Business	411,000	521,000	26.8%	14.3%
Visiting friends and relatives	294,000	336,000	14.3%	-0.6%
Holiday or leisure	333,000	292,000	-12.3%	-7.6%
Other*	50,000	43,000	-14.0%	6.4%
Australian Interstate Visitors				
Holiday or leisure	9,262,000	9,035,000	-2.5%	-2.3%
Visiting friends and relatives	7,686,000	7,585,000	-1.3%	0.6%
Business	6,211,000	6,723,000	8.2%	6.6%
Other*	1,206,000	1,107,000	-8.2%	6.8%



¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 553 Australian residents.

[^] AAGR = Average Annual Growth Rate

* Other includes: education (mostly students), employment or leisure (e.g. working holiday), health-related, in transit (passing through), provided transport etc.

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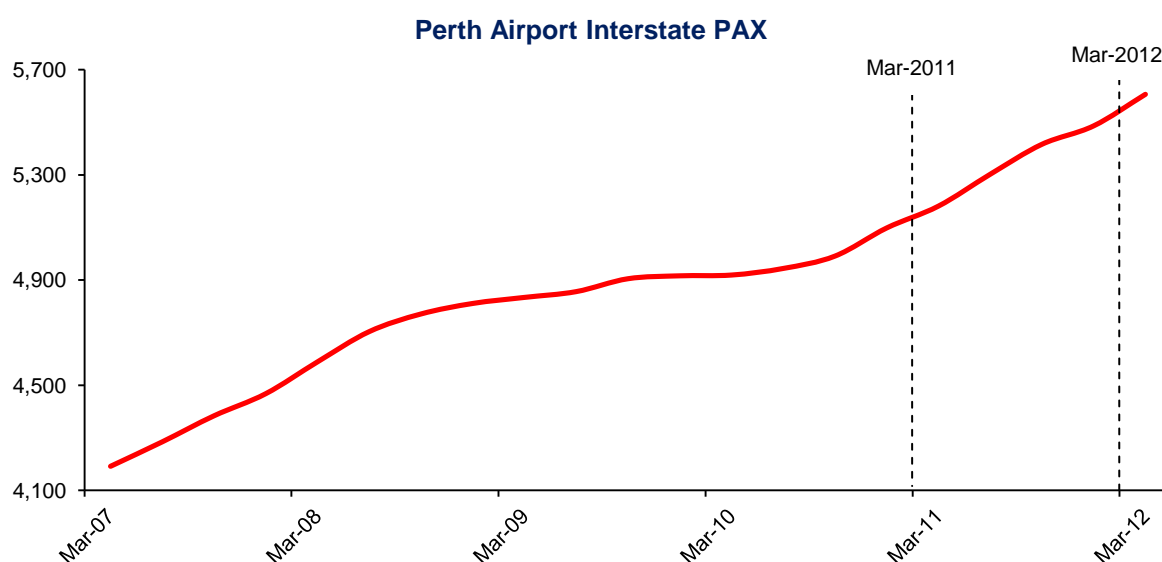
Perth Airports – Interstate Passengers (PAX)

- Interstate passenger traffic continues to grow through Perth Airport with an (+) 8.2% increase at YE March 2012 over YE March 2011.
- Long term trends show a steady increase in Interstate PAX through Perth Airport, averaging at (+) 6.8% per annum over the last three years.
- This steady growth underscores the agency’s concern about the volatility of the Interstate visitor estimates from the NVS, although it is recognised that the airport figures do include Fly-in Fly-out (FIFO) passengers on commercial flights.
- It should be noted that the interstate data from the NVS remains extremely volatile. The likely visitation levels fall somewhere between the Perth Airport and NVS figures.

Top Interstate routes to Western Australia (PAX)¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 year AAGR [^]
Perth (All Interstate PAX ^{**})	5,180,906	5,606,448	8.2%	6.8%
Melbourne (All Revenue PAX ^{***})	1,780,151	1,883,745	5.8%	5.4%
Sydney (All Revenue PAX ^{***})	1,648,304	1,759,506	6.7%	8.7%
Brisbane (All Revenue PAX ^{***})	770,586	898,967	16.7%	11.5%
Adelaide (All Revenue PAX ^{***})	598,228	593,992	-0.7%	-2.5%

Perth Airport Interstate PAX



¹ BITRE Domestic City Pairs (Top 50 domestic routes) and Perth Airport Pty Ltd.

[^] AAGR = Average Annual Growth Rate

^{**} PAX = Total passengers (arrivals and departures).

^{***} Revenue PAX = Total passengers (arrivals and departures), but excluding non-fare paying passengers.

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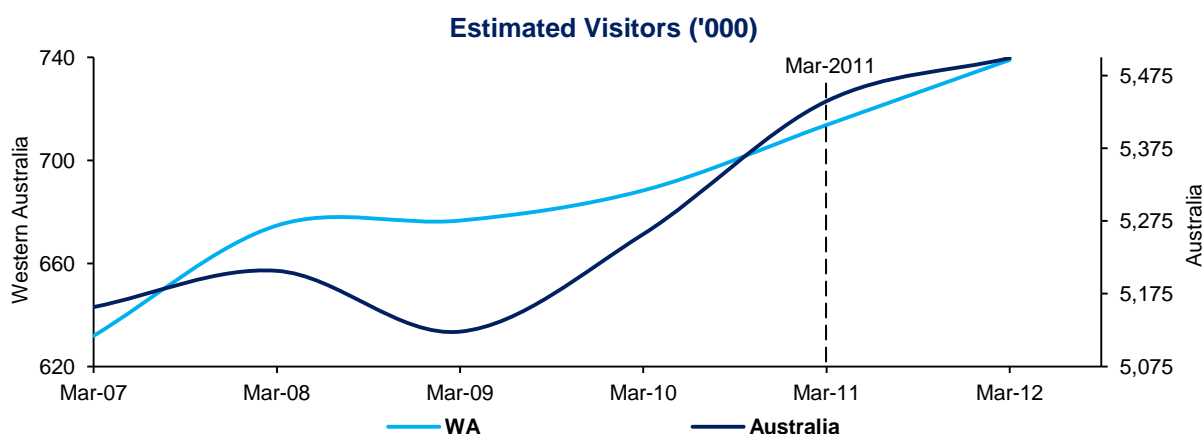
The International Market

As a result of the changes detailed on page 1 all data in this report has been re-calculated. Therefore none of the data in this report should be compared to previously published figures.

International Overnight Visitor Estimates – International Visitor Survey¹

- The International Visitor Survey (IVS) is a survey of international visitors as they are leaving Australia, with the data reconciled to the information collected by the Department of Immigration.
- WA experienced growth across the main international measures for YE March 2012 (i.e. visitor numbers, nights and spend).
- 739,000 international visitors came to WA in YE March 2012; an increase of (+) 3.5% for WA, ahead of the national average growth rate of (+) 1.1%. While year on year growth is up, the overall growth rate has flattened somewhat in the last quarter (+4.8% growth recorded for YE December 2011).
- International visitors spent 24.4 million nights in WA, up (+) 9.7% and greater than the national average growth rate of (+) 5.5%. This represents an increase in average length of stay from YE December 2011 (33 nights vs. 31 nights). Similar to the increase in visitors, the growth in visitor nights is due to working holiday and employment visitors staying longer in WA (+57% or 1,337,200 additional nights and +25% or 806,800 additional nights respectively).
- International visitors spent more in WA during YE March 2012, with spend growing (+) 7.1% over YE March 2011.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 year AAGR [^]
WA				
Spend (\$m)	\$1,869	\$2,001	7.1%	N/A
Visitors	713,800	739,000	3.5%	3.6%
Nights	22,209,200	24,363,200	9.7%	6.9%
National				
Spend (\$m)	\$16,457	\$17,162	4.3%	N/A
Visitors	5,439,600	5,499,000	1.1%	2.3%
Nights	186,303,300	196,609,500	5.5%	4.1%



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years). Sample Size: 6,620 International visitors.

[^] AAGR = Average Annual Growth Rate

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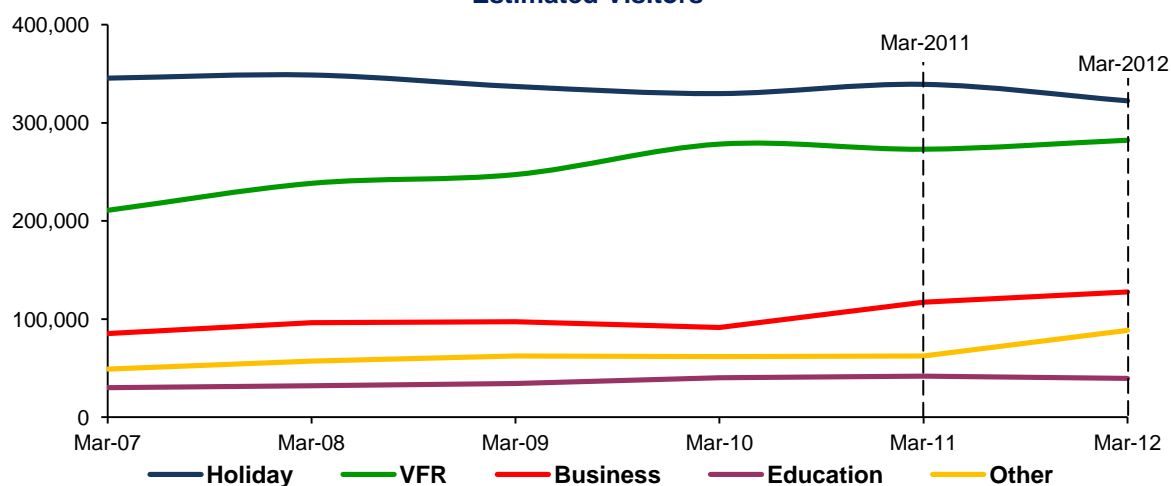
Purpose of Visit - International Overnight Visitor Estimates (IVS)¹

- YE March 2012 has seen WA's largest international visitor segment, the holiday/leisure segment, take a downturn (-5.0% or 16,900 fewer visitors).
- The visiting friends and relatives (VFR) segment grew (+) 3.3% for YE March 2012 while business visitors to WA grew (+) 9.0%.
- The international 'other' segment has seen significant growth (+41.3%), driven primarily by international employment (+47% or 17,300 additional visitors) and working holiday visitors (+36% or 8,000 additional visitors).

Overview

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA International Visitors				
Holiday or Leisure	339,200	322,300	-5.0%	-1.1%
Visiting friends and relatives (VFR)	273,100	282,200	3.3%	0.7%
Business	117,100	127,600	9.0%	18.2%
Education	41,900	39,500	-5.7%	-0.8%
Other	62,500	88,300	41.3%	19.5%
Australian International Visitors				
Holiday or Leisure	2,874,000	2,825,700	-1.7%	-0.2%
Visiting friends and relatives (VFR)	1,959,300	1,991,200	1.6%	1.9%
Business	908,300	926,600	2.0%	7.2%
Education	413,100	410,500	-0.6%	0.6%
Other	699,900	714,400	2.1%	6.9%

Estimated Visitors



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years). Sample Size: 6,620 International visitors.

[^] AAGR = Average Annual Growth Rate

* Other includes: education (mostly students), employment or leisure (e.g. working holiday), health-related, in transit (passing through), provided transport etc.

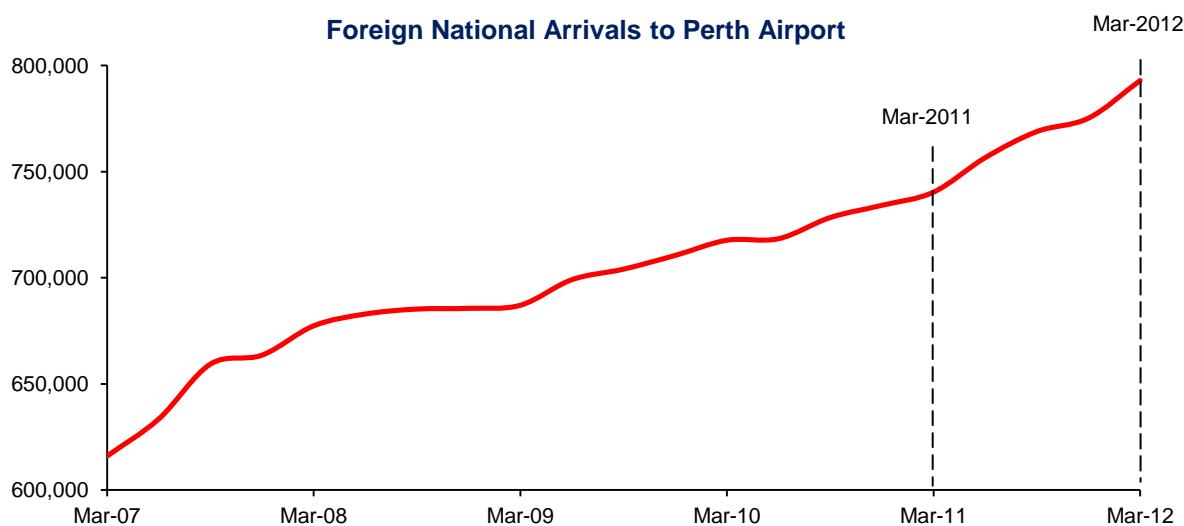
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Perth Airport – Foreign National Arrivals¹

- Foreign national arrivals through Perth airport grew (+) 7.1% in the last 12 months.
- Long term trends show a steady increase in Foreign National Arrivals through Perth Airport.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Foreign National Arrivals**	740,294	792,885	7.1%	5.1%
Foreign National Departures***	705,479	744,217	5.5%	4.4%
Foreign National PAX****	1,445,773	1,537,102	6.3%	4.8%

Foreign National Arrivals to Perth Airport



¹ BITRE Domestic City Pairs (Top 50 domestic routes) and DIAC (Department of Immigration and Citizenship).

[^] AAGR = Average Annual Growth Rate

** **Foreign National Arrivals** = International Arrivals excluding Australian passport holders, but including Australian residents travelling on foreign passports.

*** **Foreign National Departures** = International Departures excluding Australian passport holders, but including Australian residents travelling on foreign passports.

**** **Foreign National PAX** = Total passengers (arrivals and departures)

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International Source Markets - Spend (IVS)

Ranked by Visitor Spend (\$ Millions)¹

Country of Residence	Western Australia					Australia				
	Rank	YE Mar-11	YE Mar-12	% Change	3 Year AAGR [^]	Rank	YE Mar-11	YE Mar-12	% Change	3 Year AAGR [^]
UK	1	249	265	6.4%	N/A	2	1,593	1,559	-2.1%	N/A
Singapore	2	185	190	2.7%	N/A	6	838	916	9.3%	N/A
Malaysia	3	185	161	-13.0%	N/A	7	801	762	-4.9%	N/A
NZ	4	107	138	29.0%	N/A	3	1,433	1,516	5.8%	N/A
China	5	101	137	35.6%	N/A	1	2,390	2,576	7.8%	N/A
USA	6	110	122	10.9%	N/A	4	1,091	1,113	2.0%	N/A
Indonesia	7	95	108	13.7%	N/A	12	431	510	18.3%	N/A
Ireland	8	54	101	84.6%	N/A	13	329	463	40.7%	N/A
Japan	9	65	61	-6.2%	N/A	8	659	692	5.0%	N/A
Germany	10	72	60	-16.7%	N/A	11	491	524	6.7%	N/A
South Africa	11	57	56	-0.7%	N/A	21	183	199	8.9%	N/A
Hong Kong	12	75	52	-30.7%	N/A	9	620	573	-7.6%	N/A
France	13	44	50	13.6%	N/A	16	320	343	7.2%	N/A
Canada	14	40	48	20.0%	N/A	14	384	399	3.9%	N/A
India	15	45	45	0.0%	N/A	10	650	530	-18.5%	N/A
Korea	16	30	43	43.3%	N/A	5	904	936	3.5%	N/A
Philippines	17	39	39	-0.4%	N/A	19	236	289	22.6%	N/A
Scandinavia	18	24	36	50.0%	N/A	18	281	290	3.2%	N/A
Thailand	19	57	33	-42.1%	N/A	17	362	339	-6.4%	N/A
Switzerland	20	27	31	14.8%	N/A	23	174	164	-5.7%	N/A
Italy	21	18	19	5.6%	N/A	20	174	204	17.2%	N/A
Netherlands	22	23	18	-21.7%	N/A	24	154	136	-11.7%	N/A

¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

[^] AAGR = Average Annual Growth Rate

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International Source Markets - Visitors (IVS)

Ranked by Visitors¹

Country of Residence	Western Australia					Australia				
	Rank	YE Mar-11	YE Mar-12	% Change	3 Year AAGR [^]	Rank	YE Mar-11	YE Mar-12	% Change	3 Year AAGR [^]
UK	1	146,600	136,700	-6.8%	-5.9%	2	587,000	577,500	-1.6%	-4.1%
NZ	2	64,400	77,200	19.9%	14.4%	1	1,064,300	1,076,000	1.1%	3.2%
Singapore	3	70,800	70,300	-0.7%	-1.7%	6	273,400	276,400	1.1%	4.1%
Malaysia	4	59,800	58,700	-1.8%	1.8%	7	216,500	215,800	-0.3%	4.9%
USA	5	46,700	48,200	3.2%	10.5%	4	438,100	433,300	-1.1%	-2.8%
Indonesia	6	27,900	31,500	12.9%	14.1%	12	114,500	129,000	12.7%	12.2%
Germany	7	29,300	28,400	-3.1%	-0.7%	10	153,700	148,000	-3.7%	-3.5%
South Africa	8	24,300	26,400	8.6%	-2.7%	17	70,200	79,400	13.1%	1.0%
Japan	9	27,600	24,500	-11.2%	1.2%	5	352,300	310,600	-11.8%	-3.7%
China	10	21,300	24,100	13.1%	23.5%	3	462,900	530,300	14.6%	21.4%
Ireland	11	15,700	21,200	35.0%	16.2%	20	66,200	76,400	15.4%	-1.2%
France	12	15,200	18,300	20.4%	9.4%	14	90,200	90,400	0.2%	-1.6%
Canada	13	15,000	16,700	11.3%	5.5%	13	113,700	112,600	-1.0%	-2.1%
Hong Kong	14	13,700	15,400	12.4%	19.4%	9	149,600	155,400	3.9%	4.0%
Scandinavia	15	12,300	15,000	22.0%	7.0%	15	81,700	83,000	1.6%	-0.6%
India	16	12,000	12,100	0.8%	-4.3%	11	134,500	141,100	4.9%	8.4%
Thailand	17	15,300	12,000	-21.6%	-3.9%	18	77,800	78,100	0.4%	-0.3%
Switzerland	18	10,800	10,100	-6.5%	-4.6%	26	42,200	39,400	-6.6%	-3.6%
Korea	19	8,100	9,700	19.8%	1.0%	8	196,800	184,200	-6.4%	2.5%
Philippines	20	7,300	9,500	30.1%	28.0%	19	64,300	77,000	19.8%	13.0%
Netherlands	21	9,300	9,400	1.1%	-3.5%	25	46,500	45,500	-2.2%	-4.4%
Italy	22	7,600	8,900	17.1%	14.4%	21	54,200	54,100	-0.2%	0.4%

¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

[^] AAGR = Average Annual Growth Rate

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Perth Airport – Foreign National Arrivals by Country

- Perth International Airport has seen (+) 7.1% growth in foreign national arrivals (FNA) in the last 12 months. FNA excludes Australian passport holders but includes Australian residents travelling on foreign passport and are only counted if their passport is processed at Perth International Airport (international visitors entering Australia through other States/Territories will not be included in the estimates below).
- Overall the FNA data (which is used in the Health of the Industry Scorecards published monthly on the Tourism WA website) is a good indicator of what is going to be published by the IVS (a quarterly data source, published 3 months in arrears). The differences tend to come from those countries with significant populations living in WA and who may travel on foreign passports, such as the United Kingdom, New Zealand and China. However, the IVS estimates from some countries can be volatile due to small sample sizes.

Foreign National Arrivals into Western Australia¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Total Foreign National Arrivals**	740,294	792,885	7.1%	5.1%
1 UK	169,981	178,027	4.7%	0.4%
2 Malaysia	81,227	81,161	-0.1%	0.8%
3 New Zealand	65,914	76,073	15.4%	16.3%
4 Singapore	63,509	59,996	-5.5%	-1.8%
5 Indonesia	37,364	39,909	6.8%	6.4%
6 China	26,239	31,441	19.8%	18.4%
7 South Africa	27,405	29,303	6.9%	-2.1%
8 India	23,565	27,076	14.9%	10.2%
9 Germany	21,670	22,652	4.5%	4.6%
10 Japan	27,039	20,990	-22.4%	-8.9%
11 USA	15,840	18,628	17.6%	12.0%
12 France	12,560	13,776	9.7%	8.2%
13 Thailand	10,174	10,352	1.7%	-5.6%
14 South Korea	8,908	10,296	15.6%	10.8%
15 Italy	9,387	10,288	9.6%	5.0%
16 Hong Kong	8,794	8,931	1.6%	6.9%
17 Taiwan	6,331	8,882	40.3%	28.9%
18 Mauritius	2,776	2,917	5.1%	-3.0%
19 Brunei	1,237	1,183	-4.4%	-4.5%
20 UAE	284	331	16.5%	21.8%

¹ DIAC (Department of Immigration and Citizenship)

[^] AAGR = Average Annual Growth Rate

** **Foreign National Arrivals** = International arrivals, excluding Australian passport holders but including Australian residents travelling on foreign passports.

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Perth Airport – Foreign National PAX

- Perth International Airport has seen a (+) 6.3% growth in foreign national passengers (arrivals and departures) in the last 12 months. Foreign national passengers exclude Australian passport holders but include Australian residents travelling on foreign passport and are only counted if their passport is processed at Perth International Airport (international visitors travelling via other states will not be included in the estimates below).

Foreign National PAX for Western Australia¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Total Foreign National PAX**	1,445,773	1,537,102	6.3%	4.8%
1 UK	331,668	341,263	2.9%	0.2%
2 Malaysia	161,127	160,717	-0.3%	0.3%
3 New Zealand	128,754	149,464	16.1%	15.8%
4 Singapore	126,540	120,059	-5.1%	-1.8%
5 Indonesia	74,527	79,516	6.7%	6.2%
6 China	49,514	59,784	20.7%	19.4%
7 South Africa	53,951	57,078	5.8%	-2.4%
8 India	45,678	52,213	14.3%	12.5%
9 Germany	42,241	44,183	4.6%	4.5%
10 Japan	54,328	42,138	-22.4%	-8.8%
11 USA	31,599	36,754	16.3%	11.2%
12 France	24,806	27,197	9.6%	8.0%
13 Thailand	19,998	20,538	2.7%	-5.5%
14 South Korea	17,815	19,922	11.8%	8.8%
15 Italy	17,718	19,025	7.4%	5.1%
16 Hong Kong	16,730	16,837	0.6%	7.1%
17 Taiwan	10,839	14,845	37.0%	23.3%
18 Mauritius	5,481	5,791	5.7%	-2.6%
19 Brunei	2,508	2,422	-3.4%	-4.4%
20 UAE	559	687	22.9%	21.2%

¹ DIAC (Department of Immigration and Citizenship)

[^] AAGR = Average Annual Growth Rate

** Total Foreign National PAX = International arrivals and departures, excluding Australian passport holders but including Australian residents travelling on foreign passports.

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Market Share – Top Ten International Source Markets (IVS)¹

Market Share[^] - Spend Estimates

(Ranked by overall spend estimates, YE Mar-12)

Rank	Country of Residence	YE Mar-10	YE Mar-11	YE Mar-12
1	UK	N/A	15.6%	17.0%
2	Singapore	N/A	22.1%	20.7%
3	Malaysia	N/A	23.1%	21.1%
4	NZ	N/A	7.5%	9.1%
5	China	N/A	4.2%	5.3%
6	USA	N/A	10.1%	11.0%
7	Indonesia	N/A	22.0%	21.2%
8	Ireland	N/A	16.6%	21.7%
9	Japan	N/A	9.9%	8.8%
10	Germany	N/A	14.7%	11.5%
16	Korea	N/A	3.3%	4.6%

Market Share[^] - Visitor Estimates

(Ranked by overall visitor estimates, YE Mar-12)

Rank	Country of Residence	YE Mar-10	YE Mar-11	YE Mar-12
1	UK	24.6%	25.0%	23.7%
2	NZ	5.8%	6.1%	7.2%
3	Singapore	28.5%	25.9%	25.4%
4	Malaysia	28.9%	27.6%	27.2%
5	USA	8.6%	10.7%	11.1%
6	Indonesia	23.6%	24.4%	24.4%
7	Germany	18.1%	19.1%	19.2%
8	South Africa	35.9%	34.6%	33.2%
9	Japan	7.1%	7.8%	7.9%
10	China	4.4%	4.6%	4.5%
11	Ireland	20.1%	23.7%	27.7%
19	Korea	5.4%	4.1%	5.3%

¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

[^] Market Share = WA's market share of total visitors from the specified country who come to Australia.

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Regional Dispersal of Visitors

Year on year comparisons by Tourism Regions need to be considered with caution due to small sample sizes.

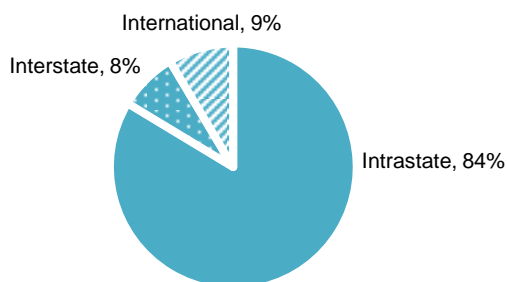
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Regional Dispersal – Australia’s Coral Coast¹

- Australia’s Coral Coast has seen an overall growth in visitor numbers, driven by increases in both domestic markets. International visitor numbers to Australia’s Coral Coast are down and as a result, International visitor nights are also showing a decrease of (-) 21.1%.
- Positively, the largest source market for Australia’s Coral Coast remains the intrastate market, which is showing growth in visitor numbers of (+) 17.5%. Intrastate visitors are however not staying as long, as visitor nights are down by (-) 1.9%.
- The 3 Year Average Annual Growth Rate (AAGR) is considered a more reliable indicator of trend. It is showing an upward trend in visitors in total.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [▲]
Total				
Visitors	620,800	706,500	13.8%	11.5%
Nights	4,260,200	4,079,900	-4.2%	5.7%
Domestic Total				
Visitors	550,000	646,000	17.5%	13.6%
Nights	3,288,000	3,313,000	0.8%	7.9%
Intrastate				
Visitors	503,000	591,000	17.5%	14.7%
Nights	2,885,000	2,831,000	-1.9%	8.4%
Interstate				
Visitors	48,000	55,000	14.6%	2.8%
Nights	403,000	482,000	19.6%	4.9%
International				
Visitors	70,800	60,500	-14.5%	-5.0%
Nights	972,200	766,900	-21.1%	-2.3%

Australia's Coral Coast



* **Tourism Research Australia** - National Visitor Survey (visitors aged 15+ years); International Visitor Survey (visitors aged 15+ years)

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

Domestic CI: Visitors ± 16.1%, Nights ± 21.4%;

Intrastate CI: Visitors ± 16.8%, Nights ± 22.9%;

Interstate CI: Visitors ± 49.2%, Nights ± 49.1%;

International CI: Visitors ± 18.3%, Nights ± 51.7%.

▲ **AAGR** = Average Annual Growth Rate

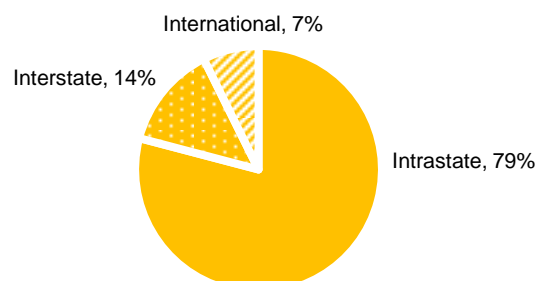
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Regional Dispersal – Australia’s Golden Outback¹

- Visitor numbers to Australia’s Golden Outback have risen whilst nights have dropped by (-) 4.7%.
- Interstate visitor numbers are showing growth for YE March 2012. Interstate visitors’ year on year comparison needs to be considered with caution due to the small sample sizes.
- The intrastate market, the largest source market for Australia’s Golden Outback, is showing growth in both visitor numbers (+7.2%) and nights (+5.9%).
- The 3 Year Average Annual Growth Rate (AAGR) is considered a more reliable indicator of trend at the regional level. It is showing a slight downward trend overall for the domestic market, which coupled with the steady trend in the international market, has translated into a slight downward trend in the total market.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Total				
Visitors	533,100	581,600	9.1%	-0.8%
Nights	3,124,900	2,977,900	-4.7%	8.6%
Domestic Total				
Visitors	489,000	539,000	10.2%	-0.8%
Nights	2,156,000	2,187,000	1.4%	5.4%
Intrastate				
Visitors	429,000	460,000	7.2%	-2.9%
Nights	1,675,000	1,774,000	5.9%	4.0%
Interstate				
Visitors	61,000	79,000	29.5%	14.7%
Nights	481,000	414,000	-13.9%	12.7%
International				
Visitors	44,100	42,600	-3.4%	0.1%
Nights	968,900	790,900	-18.4%	19.1%

Australia's Golden Outback



* **Tourism Research Australia** - National Visitor Survey (visitors aged 15+ years); International Visitor Survey (visitors aged 15+ years)

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

Domestic CI: Visitors ± 17.5%, Nights ± 25.6%;

Intrastate CI: Visitors ± 18.8%, Nights ± 28.0%;

Interstate CI: Visitors ± 41.7%, Nights ± 52.4%;

International CI: Visitors ± 21.6%, Nights ± 50.9%.

[^] **AAGR** = Average Annual Growth Rate

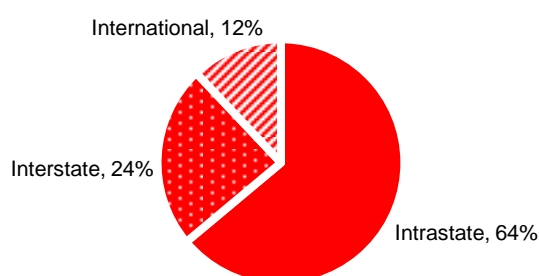
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Regional Dispersal – Australia’s North West¹

- Australia’s North West has seen an overall growth in visitor numbers and visitor nights. International visitors and nights have increased considerably and are up by (+) 19.9% and (+) 57.6% respectively.
- The Interstate market has seen a decrease in both visitor numbers and nights for YE March 2012. Interstate year-on-year comparisons need to be read with caution due to small sample sizes.
- The 3 Year Average Annual Growth Rate (AAGR) is considered a more reliable indicator of trend at the regional level. It is showing an upward trend overall for visitors and nights.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Total				
Visitors	519,200	598,200	15.2%	7.1%
Nights	5,184,600	6,098,700	17.6%	14.1%
Domestic Total				
Visitors	459,000	526,000	14.6%	7.3%
Nights	3,817,000	3,943,000	3.3%	13.0%
Intrastate				
Visitors	299,000	383,000	28.1%	7.2%
Nights	2,088,000	2,553,000	22.3%	13.6%
Interstate				
Visitors	159,000	144,000	-9.4%	7.8%
Nights	1,730,000	1,390,000	-19.7%	11.9%
International				
Visitors	60,200	72,200	19.9%	5.9%
Nights	1,367,600	2,155,700	57.6%	16.3%

Australia's North West



* **Tourism Research Australia** - National Visitor Survey (visitors aged 15+ years); International Visitor Survey (visitors aged 15+ years)

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

Domestic CI: Visitors ± 17.7%, Nights ± 19.8%;

Intrastate CI: Visitors ± 20.5%, Nights ± 23.9%;

Interstate CI: Visitors ± 31.9%, Nights ± 31.1%;

International CI: Visitors ± 16.8%, Nights ± 30.3%.

[^] **AAGR** = Average Annual Growth Rate

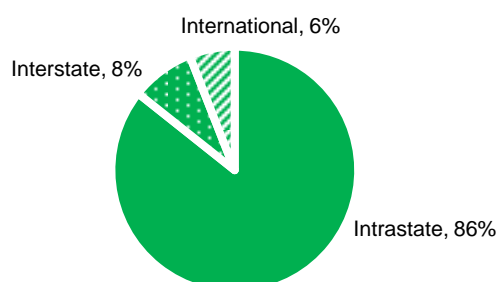
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Regional Dispersal – Australia’s South West¹

- Overall, visitors and visitor nights to Australia’s South West have grown in the last year.
- International visitors are down by (-) 6.3%, however those that are visiting are staying longer in the region as nights are up by (+) 16.9%.
- Domestic visitors and nights to the region have increased for YE March 2012. Interstate visitors’ year-on-year comparison needs to be considered with caution due to the small sample sizes.
- The 3 Year Average Annual Growth Rate (AAGR) is considered a more reliable indicator of trend at the regional level. Overall, it showing an upward trend for visitor numbers and nights.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Total				
Visitors	1,776,400	1,987,400	11.9%	8.0%
Nights	7,551,300	8,070,100	6.9%	8.3%
Domestic Total				
Visitors	1,650,000	1,869,000	13.3%	8.6%
Nights	5,992,000	6,248,000	4.3%	7.1%
Intrastate				
Visitors	1,513,000	1,703,000	12.6%	9.0%
Nights	4,895,000	5,348,000	9.3%	7.0%
Interstate				
Visitors	137,000	166,000	21.2%	4.8%
Nights	1,096,000	900,000	-17.9%	8.3%
International				
Visitors	126,400	118,400	-6.3%	-1.1%
Nights	1,559,300	1,822,100	16.9%	12.4%

Australia's South West



* **Tourism Research Australia** - National Visitor Survey (visitors aged 15+ years); International Visitor Survey (visitors aged 15+ years)

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

Domestic CI: Visitors ± 10.0%, Nights ± 16.3%;

Intrastate CI: Visitors ± 10.4%, Nights ± 17.4%;

Interstate CI: Visitors ± 29.9%, Nights ± 37.5%;

International CI: Visitors ± 13.3%, Nights ± 33.0%.

[^] **AAGR** = Average Annual Growth Rate

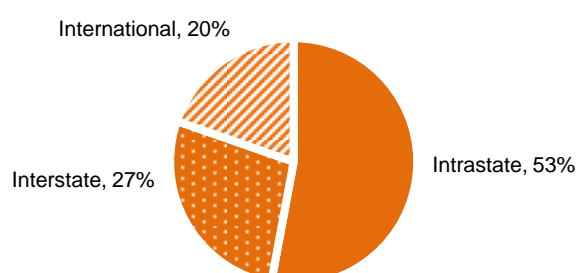
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Regional Dispersal – Experience Perth¹

- Experience Perth has seen an overall growth in the number of visitors due to increases in all source markets.
- The largest source market for Experience Perth, the intrastate market is showing growth in visitor numbers (+11.6%) and nights (+16.5%).
- Interstate visitors too, have increased, however this market's year-on-year comparison needs to be considered with caution due to the small sample sizes.
- The 3 Year Average Annual Growth Rate (AAGR) is considered a more reliable indicator of trend. Overall, it is showing an upward trend in visitors and nights in total.

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
Total				
Visitors	3,222,900	3,536,400	9.7%	6.8%
Nights	26,453,000	29,234,200	10.5%	6.2%
Domestic Total				
Visitors	2,541,000	2,841,000	11.8%	7.9%
Nights	9,250,000	10,566,000	14.2%	7.9%
Intrastate				
Visitors	1,678,000	1,872,000	11.6%	10.6%
Nights	4,427,000	5,157,000	16.5%	12.4%
Interstate				
Visitors	862,000	969,000	12.4%	3.1%
Nights	4,823,000	5,409,000	12.2%	4.0%
International				
Visitors	681,900	695,400	2.0%	2.6%
Nights	17,203,000	18,668,200	8.5%	5.3%

Experience Perth



* **Tourism Research Australia** - National Visitor Survey (visitors aged 15+ years); International Visitor Survey (visitors aged 15+ years)

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

Domestic CI: Visitors ± 8.3%, Nights ± 13.0%;

Intrastate CI: Visitors ± 10.0%, Nights ± 17.7%;

Interstate CI: Visitors ± 13.4%, Nights ± 17.3%;

International CI: Visitors ± 5.8%, Nights ± 9.9%.

[^] **AAGR** = Average Annual Growth Rate

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Accommodation

(Latest available data YE March 2012)

(Not analysed by source market)

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Accommodation Statistics

Hotels, Motels and Serviced Apartments – 15+ Rooms¹

- In the year ending December 2011, occupancy rates at establishments in the CBD increased by (+) 3.6% to 84.1%. Note that occupancy rates in the CBD tend to differ weekday to weekend and these figures from the ABS are the average across the whole period.
- Although specific data on STR Global members in the Perth CBD is confidential, at a broad level their member occupancy rates have shown an increase of (+) 3.0% for YE December 2011.
- The ABS showed that RevPAR for larger hotels in the Perth CBD is increasing. A subset of this data collected by STR Global from its members showed an increase of (+) 15.6% for YE December 2011.

Hotels, Motels and Serviced Apartments – 15+ Rooms				
Occupancy Rates and RevPAR – (Australian Bureau of Statistics), YE December 2011				
	Room Occupancy	% Change on Previous Year	RevPAR [^]	% Change on Previous Year
Western Australia	68.3%	5.4%	\$121.37	13.5%
Perth CBD	84.1%	3.6%	\$168.49	15.1%
Australia's Coral Coast	58.6%	11.2%	\$84.76	20.2%
Australia's Golden Outback	60.1%	15.2%	\$72.46	20.1%
Australia's North West	64.2%	6.1%	\$123.78	10.8%
Australia's South West	51.4%	1.2%	\$74.02	6.2%
Experience Perth	78.3%	4.4%	\$150.79	14.7%

¹ **Australian Bureau of Statistics**, Survey of Tourist Accommodation (STA): STR Global member statistics. The scope of the STA has been reduced to cover only hotels, motels and serviced apartments with 15 or more rooms. The following categories of establishments have been excluded since the September quarter 2010 issue of this publication and onwards:

- hotels, motels and serviced apartments with 5 to 14 rooms
- holiday flats, units and houses of letting entities with 15 or more rooms or units
- visitor hostels with 25 or more bed spaces.

[^] **RevPAR** = Revenue per available room. Not a valid measure for caravan parks and hostels.

ABS statistics are not available in those segments or regions where it would be possible to identify operators.

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Appendices

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Additional Analysis by Purpose of Visit across both IVS and NVS - Overnight Visitors to WA

Purpose of Visit – Leisure (International & Domestic)¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Spend (\$m)	2,204	2,264	2.7%	N/A
Visitors	2,708,200	2,815,300	4.0%	4.7%
Nights	17,543,900	18,590,700	6.0%	6.5%
Australia				
Spend (\$m)	26,642	26,716	0.3%	N/A
Visitors	33,553,000	34,115,700	1.7%	0.7%
Nights	188,390,500	193,660,400	2.8%	0.2%

Purpose of Visit – Business (International & Domestic)¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Spend (\$m)	916	1,366	49.1%	N/A
Visitors	1,266,100	1,602,600	26.6%	14.3%
Nights	7,273,900	8,414,300	15.7%	13.9%
Australia				
Spend (\$m)	8,326	10,189	22.4%	N/A
Visitors	13,905,300	15,190,600	9.2%	7.4%
Nights	50,544,800	53,859,000	6.6%	7.2%

Purpose of Visit – Visiting Friends & Relatives (International & Domestic)¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Spend (\$m)	880	960	9.1%	N/A
Visitors	1,802,100	2,032,200	12.8%	3.7%
Nights	11,796,500	12,586,500	6.7%	1.5%
Australia				
Spend (\$m)	9,577	10,515	9.8%	N/A
Visitors	25,082,300	27,233,200	8.6%	5.4%
Nights	121,897,800	133,514,300	9.5%	5.9%

¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 4,290 Australian residents; International Visitor Survey (visitors aged 15+ years). Sample Size: 6,620 International visitors.

[^] AAGR = Average Annual Growth Rate

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Purpose of Visit – Education (International Only)¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Spend (\$m)	478	476	-0.4%	N/A
Visitors	41,900	39,500	-5.7%	-0.8%
Nights	4,790,000	4,630,500	-3.3%	3.2%
Australia				
Spend (\$m)	5,212	5,325	2.2%	N/A
Visitors	413,100	410,500	-0.6%	0.6%
Nights	51,900,800	51,919,700	0.0%	0.5%

Places visited in Western Australia¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
1 Fremantle	1,029,800	1,084,900	5.3%	-1.6%
2 Margaret River	742,900	749,700	0.9%	2.0%
3 Kings Park	609,200	610,500	0.2%	-3.1%
4 Hillarys Boat Harbour	288,100	369,400	28.2%	6.1%
5 Swan Valley	361,300	343,000	-5.1%	-4.2%
6 The Pinnacles / Cervantes	154,400	195,700	26.8%	19.6%
7 Rottnest Island	196,000	178,500	-8.9%	-9.0%
8 Ningaloo Marine Park	106,600	95,400	-10.5%	-0.8%
9 Wave Rock	67,900	87,400	28.7%	6.2%
10 Bungle Bungles / Purnululu	37,900	45,200	19.1%	-9.0%

¹ Tourism Research Australia – National Visitor Survey (visitors aged 15+ years). Sample Size: 4,290 Australian residents; International Visitor Survey (visitors aged 15+ years). Sample Size: 6,620 International visitors.

[^] AAGR = Average Annual Growth Rate

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World Tourism¹

- International tourism continues to improve showing growth of (+) 5.7% in the first two months of 2012.
- All regions recorded increases in international arrivals for the first two months of 2012 with the exception of the Middle East.
- UNWTO showed Australia achieve a (+) 4.1% increase in international tourist arrivals for the first two months of 2012 year compared to the same period in 2011.

International Tourist Arrivals by Continent

Jan – Feb 2012 % Change over the same period of 2011	
Worldwide	5.7%
Europe	5.4%
Asia and the Pacific	7.3%
Americas	6.1%
Middle East	-1.4%
Africa	7.4%

International Tourist Arrivals by Country

Jan – Feb 2012 % Change over the same period of 2011	
Australia	4.1%
United Kingdom	4.1%
New Zealand	2.2%
Malaysia	N/A
Singapore	14.6%
USA	8.0%

¹ UNWTO: World Tourism Barometer Interim Report (May 2012)

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Key International Markets

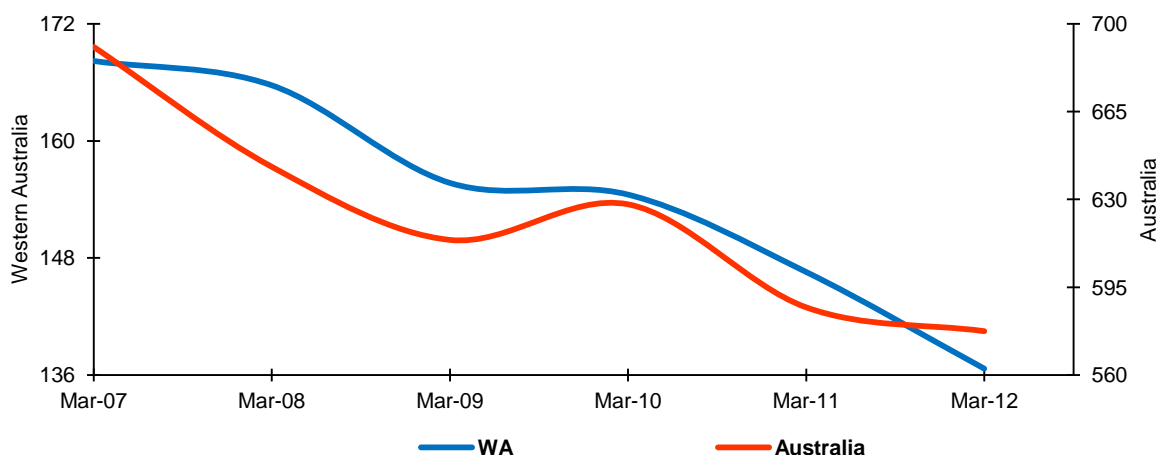
Year on year comparisons by International source markets need to be considered with caution due to small sample sizes.

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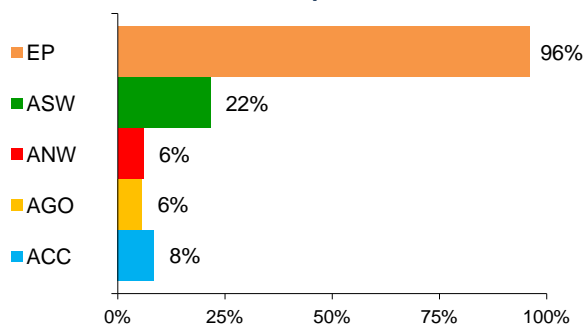
United Kingdom¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$249	\$265	6.4%	N/A
Estimated Visitors	146,600	136,700	-6.8%	-5.9%
Estimated Nights	3,549,300	3,667,700	3.3%	-3.2%
National				
Estimated Spend (\$ Mil)	\$1,593	\$1,559	-2.1%	N/A
Estimated Visitors	587,000	577,500	-1.6%	-4.1%
Estimated Nights	20,721,400	21,071,600	1.7%	-4.1%

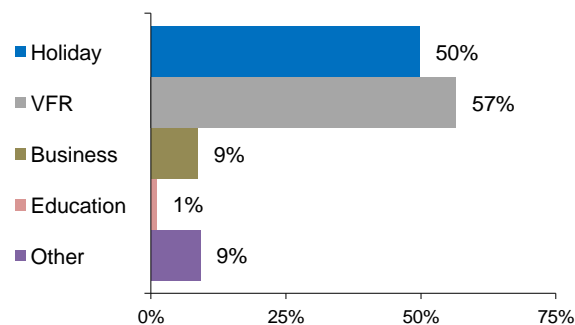
Estimated Visitors ('000)



Visitor Dispersal



Purpose of Visit



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

UK Sample Size: 1,059, CI Visitors +/- 12.4%, CI Nights +/- 23.0%.

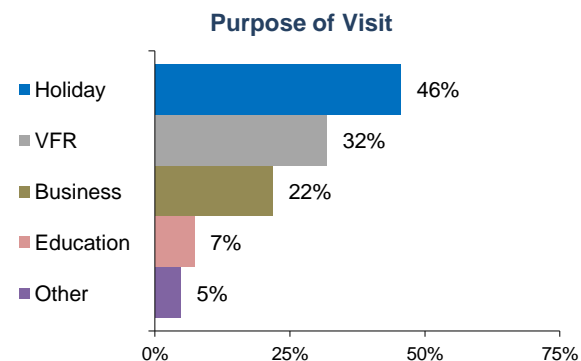
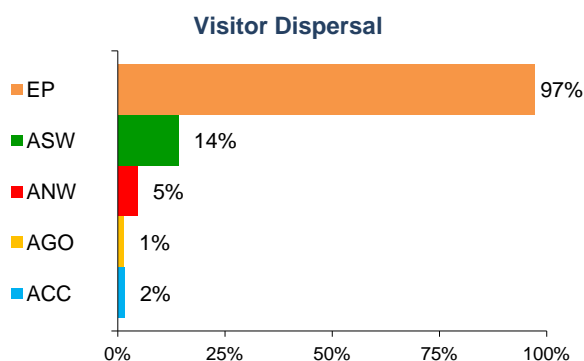
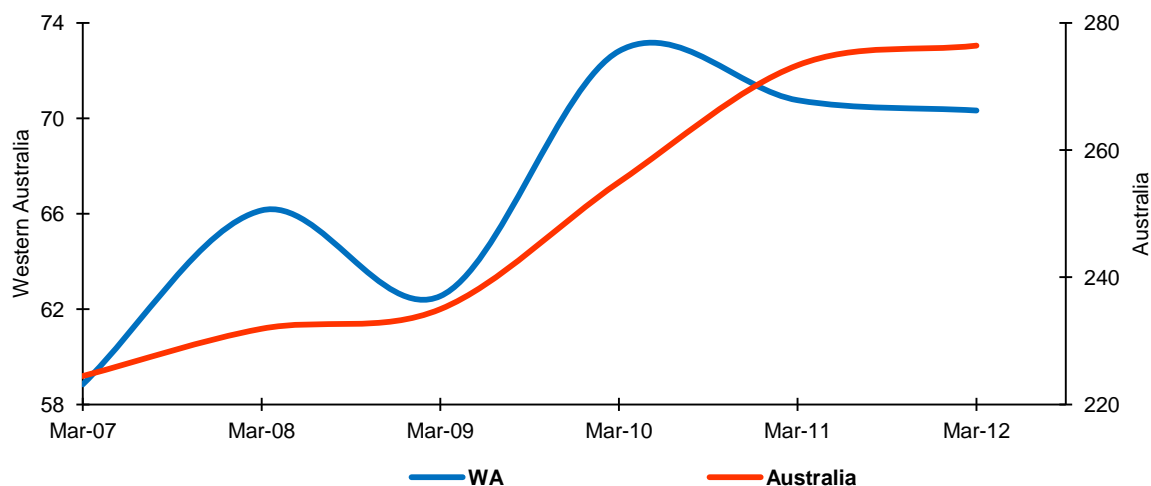
[^] AAGR = Average Annual Growth Rate

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Singapore¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$185	\$190	2.7%	N/A
Estimated Visitors	70,800	70,300	-0.7%	-1.7%
Estimated Nights	1,271,900	1,072,500	-15.7%	-13.5%
National				
Estimated Spend (\$ Mil)	\$838	\$916	9.3%	N/A
Estimated Visitors	273,400	276,400	1.1%	4.1%
Estimated Nights	5,481,600	5,917,100	7.9%	3.0%

Estimated Visitors ('000)



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

Singapore Sample Size: 770, CI Visitors +/- 17.0%, CI Nights +/- 43.5%.

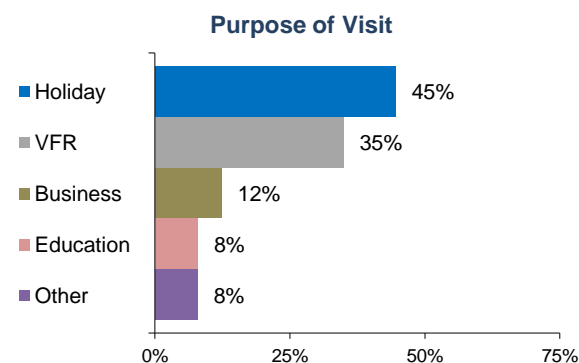
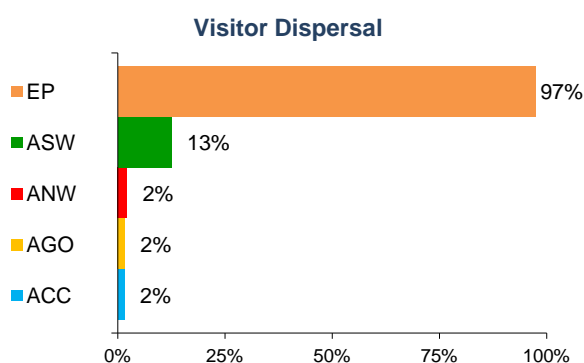
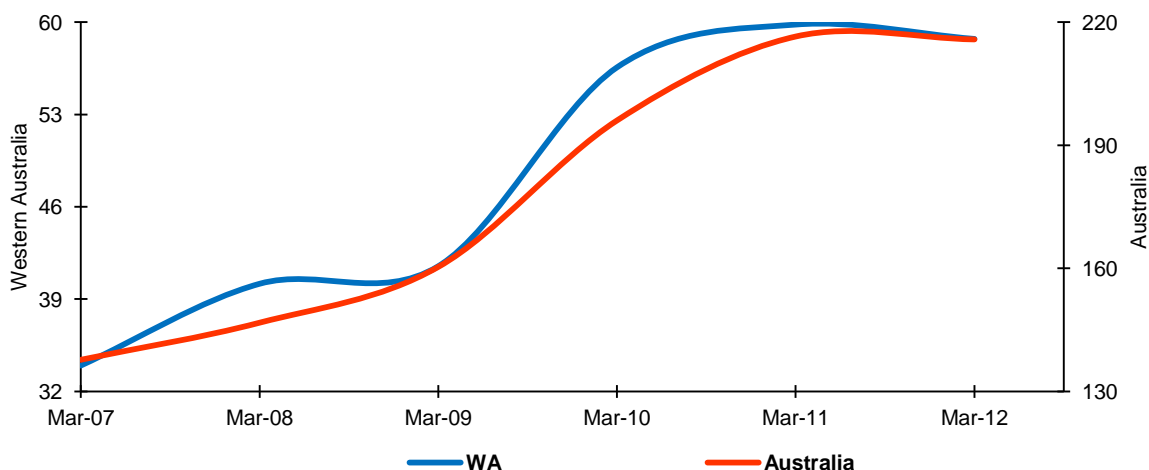
[^] AAGR = Average Annual Growth Rate

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Malaysia¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$185	\$161	-13.0%	N/A
Estimated Visitors	59,800	58,700	-1.8%	1.8%
Estimated Nights	1,550,200	1,431,500	-7.7%	4.4%
National				
Estimated Spend (\$ Mil)	\$801	\$762	-4.9%	N/A
Estimated Visitors	216,500	215,800	-0.3%	4.9%
Estimated Nights	6,956,700	6,485,600	-6.8%	0.2%

Estimated Visitors ('000)



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

Malaysia Sample Size: 507, CI Visitors +/- 18.5%, CI Nights +/- 37.4%.

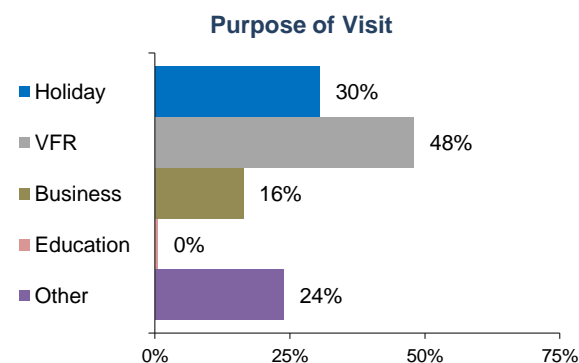
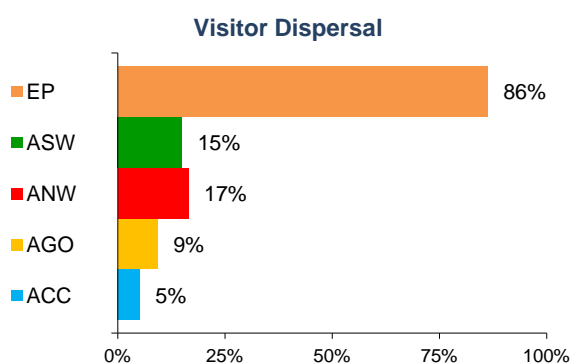
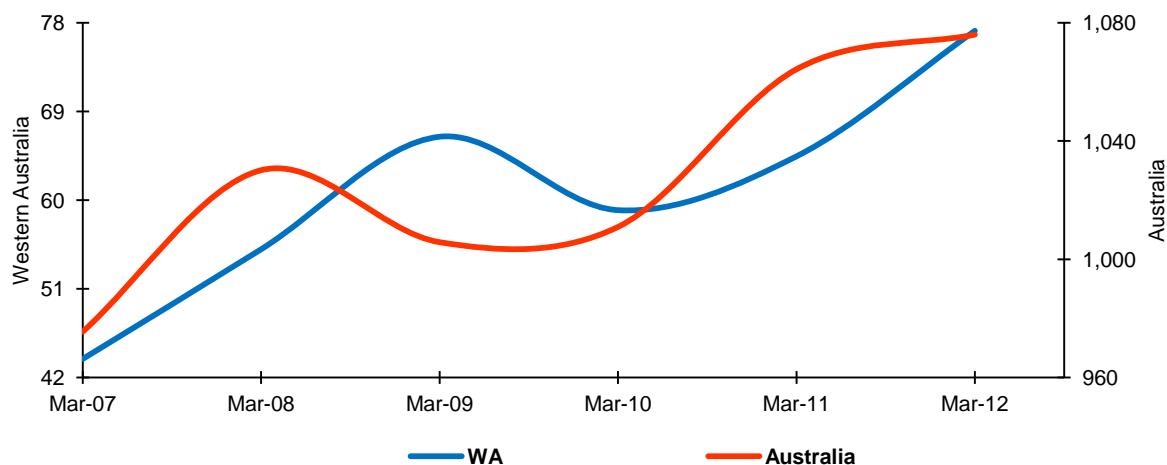
[^] AAGR = Average Annual Growth Rate

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New Zealand¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$107	\$138	29.0%	N/A
Estimated Visitors	64,400	77,200	19.9%	14.4%
Estimated Nights	1,677,600	2,139,900	27.6%	23.1%
National				
Estimated Spend (\$ Mil)	\$1,433	\$1,516	5.8%	N/A
Estimated Visitors	1,064,300	1,076,000	1.1%	3.2%
Estimated Nights	14,988,000	15,328,700	2.3%	8.0%

Estimated Visitors ('000)



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

NZ Sample Size: 448, CI Visitors +/- 16.3%, CI Nights +/- 30.4%.

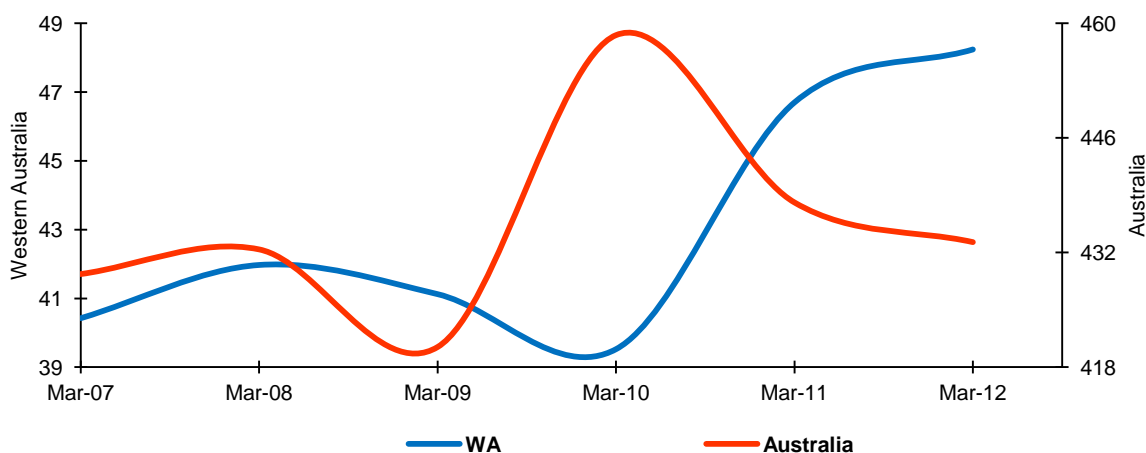
[^] AAGR = Average Annual Growth Rate

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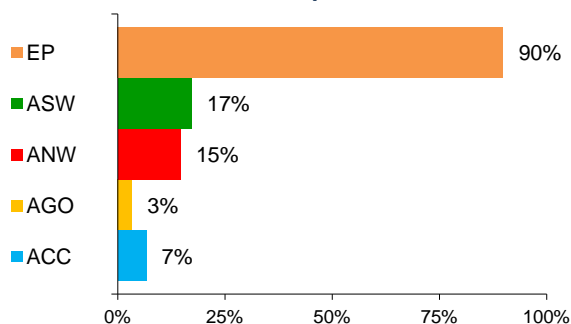
USA¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$110	\$122	10.9%	N/A
Estimated Visitors	46,700	48,200	3.2%	10.5%
Estimated Nights	980,800	1,442,700	47.1%	25.6%
National				
Estimated Spend (\$ Mil)	\$1,091	\$1,113	2.0%	N/A
Estimated Visitors	438,100	433,300	-1.1%	-2.8%
Estimated Nights	9,919,300	9,971,000	0.5%	0.5%

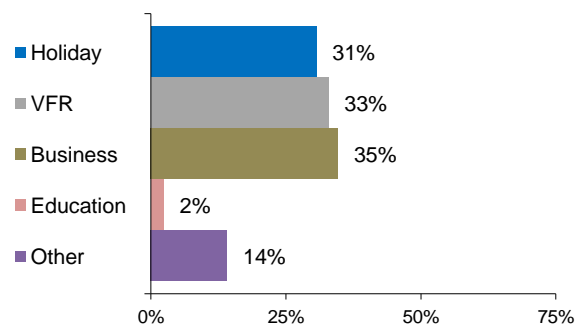
Estimated Visitors ('000)



Visitor Dispersal



Purpose of Visit



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

USA Sample Size: 381, CI Visitors +/- 20.3%, CI Nights +/- 37.3%.

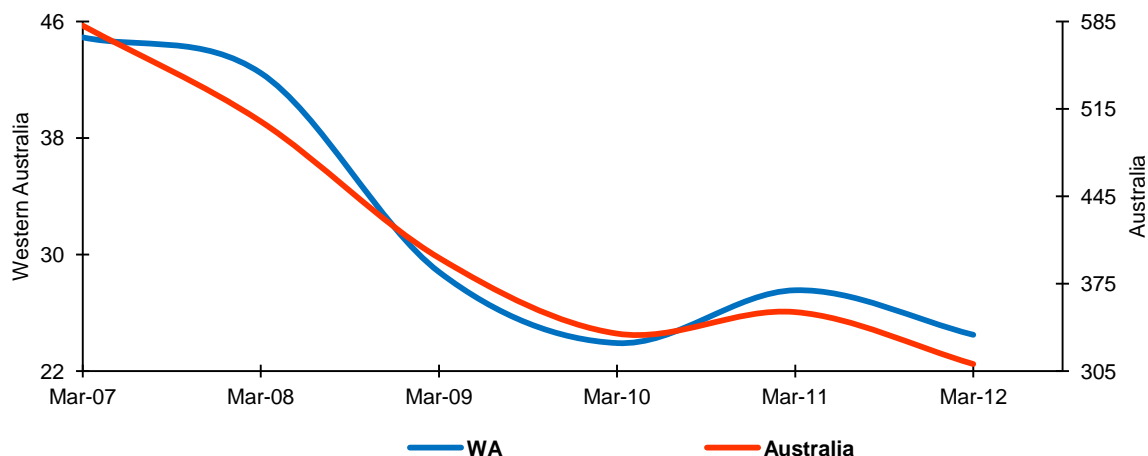
[^] AAGR = Average Annual Growth Rate

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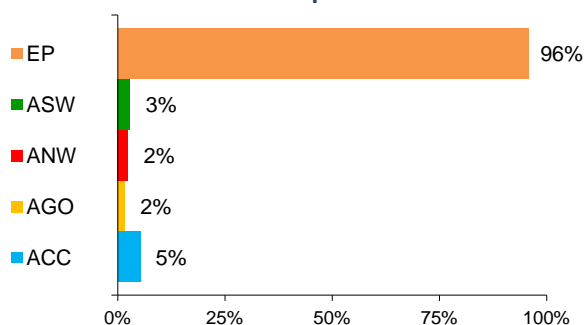
Japan¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$65	\$61	-6.2%	N/A
Estimated Visitors	27,600	24,500	-11.2%	1.2%
Estimated Nights	825,900	858,000	3.9%	6.7%
National				
Estimated Spend (\$ Mil)	\$659	\$692	5.0%	N/A
Estimated Visitors	352,300	310,600	-11.8%	-3.7%
Estimated Nights	7,556,900	7,963,700	5.4%	4.0%

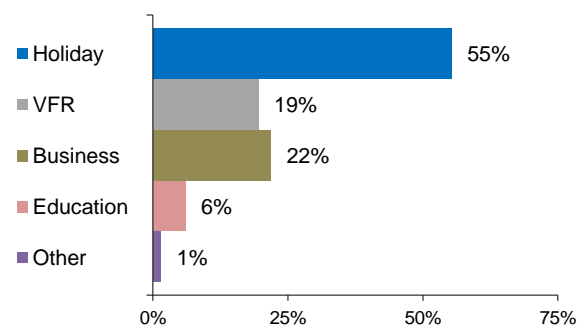
Estimated Visitors ('000)



Visitor Dispersal



Purpose of Visit



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

Japan Sample Size: 188, CI Visitors +/- 28.0%, CI Nights +/- 48.8%.

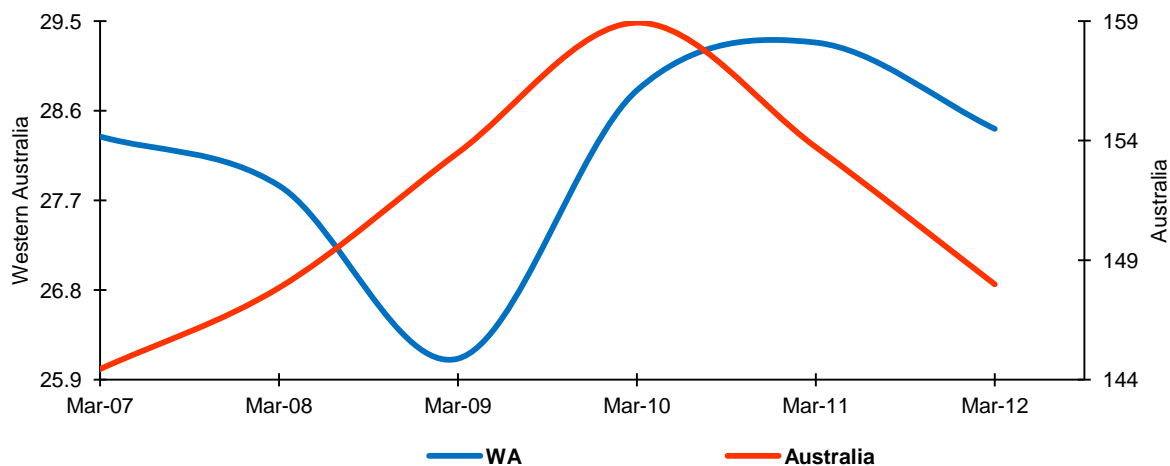
[^] AAGR = Average Annual Growth Rate

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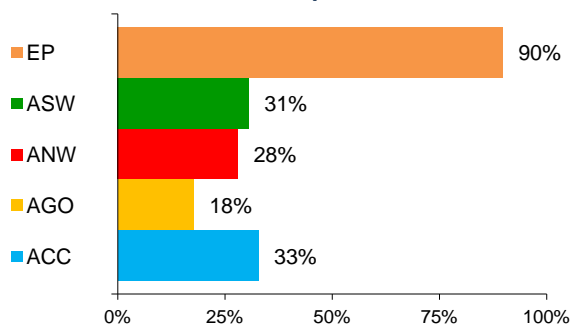
Germany¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$72	\$60	-16.7%	N/A
Estimated Visitors	29,300	28,400	-3.1%	-0.7%
Estimated Nights	817,000	917,700	12.3%	4.2%
National				
Estimated Spend (\$ Mil)	\$491	\$524	6.7%	N/A
Estimated Visitors	153,700	148,000	-3.7%	-3.5%
Estimated Nights	6,501,000	7,206,700	10.9%	-1.5%

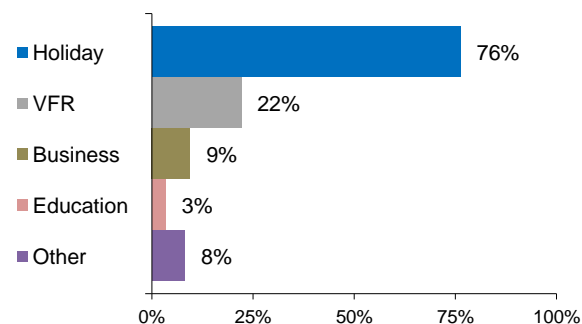
Estimated Visitors ('000)



Visitor Dispersal



Purpose of Visit



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

Germany Sample Size: 281, CI Visitors +/- 26.1%, CI Nights +/- 47.1%.

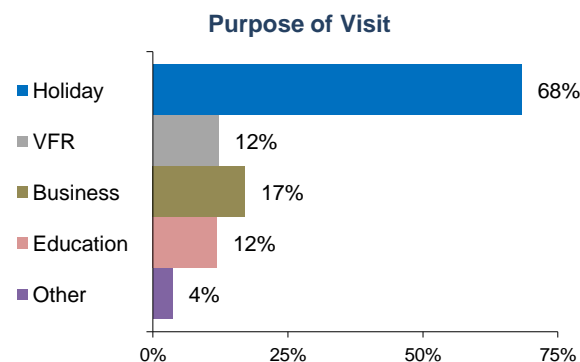
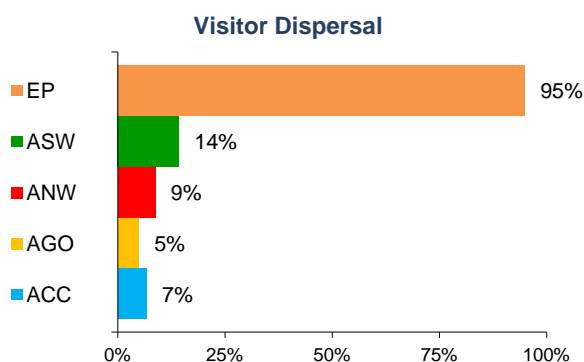
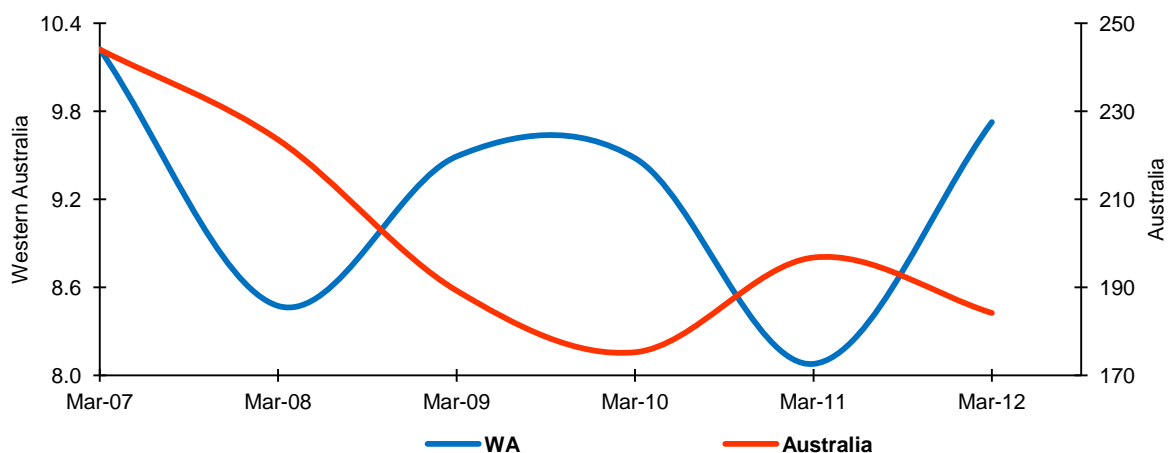
[^] AAGR = Average Annual Growth Rate

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Korea¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$30	\$43	43.3%	N/A
Estimated Visitors	8,100	9,700	19.8%	1.0%
Estimated Nights	490,100	859,600	75.4%	5.4%
National				
Estimated Spend (\$ Mil)	\$904	\$936	3.5%	N/A
Estimated Visitors	196,800	184,200	-6.4%	2.5%
Estimated Nights	12,498,600	12,504,000	0.0%	-2.6%

Estimated Visitors ('000)



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

Korea Sample Size: 112, CI Visitors +/- 43.4%, CI Nights +/- 48.7%

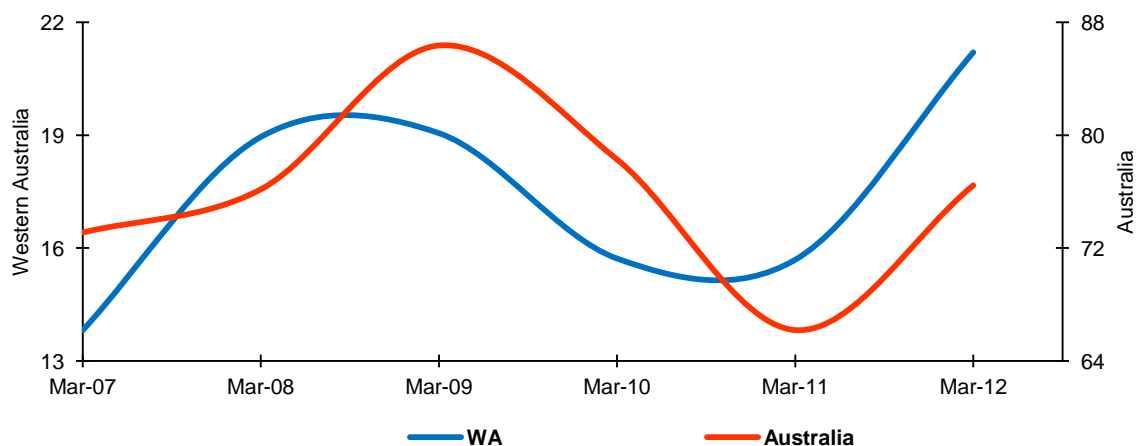
[^] AAGR = Average Annual Growth Rate

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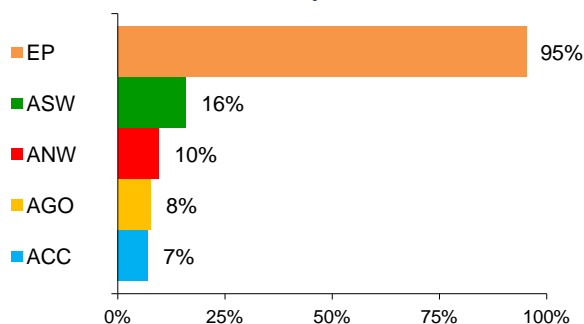
Ireland¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$54	\$101	84.6%	N/A
Estimated Visitors	15,700	21,200	35.0%	16.2%
Estimated Nights	599,300	1,375,200	129.5%	36.2%
National				
Estimated Spend (\$ Mil)	\$329	\$463	40.7%	N/A
Estimated Visitors	66,200	76,400	15.4%	-1.2%
Estimated Nights	3,993,100	5,610,400	40.5%	4.0%

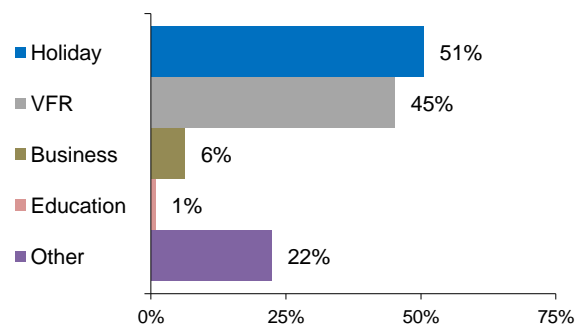
Estimated Visitors ('000)



Visitor Dispersal



Purpose of Visit



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

Ireland Sample Size: 209, CI Visitors +/- 30.0%, CI Nights +/- 38.2%.

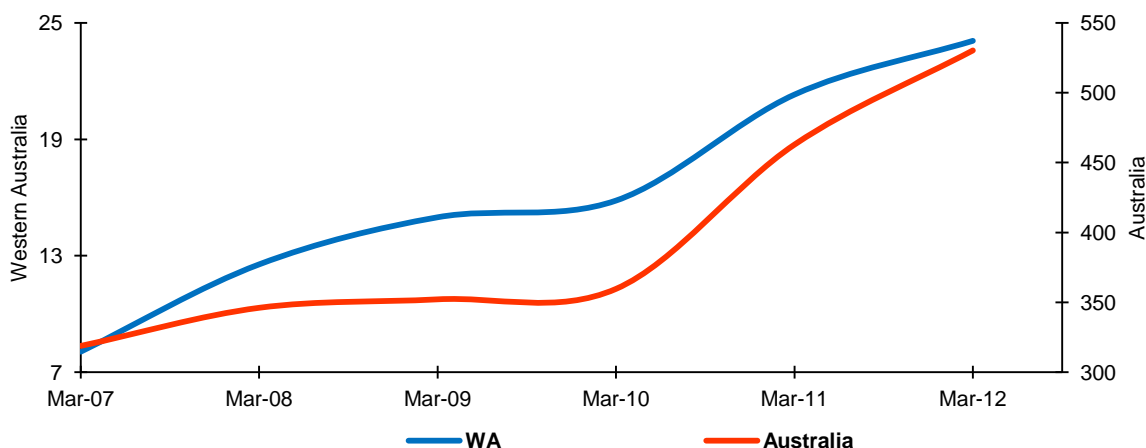
[^] AAGR = Average Annual Growth Rate

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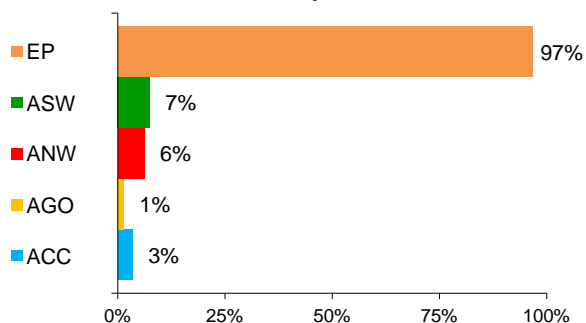
China¹

	YE Mar-11	YE Mar-12	% Change YE Mar-12 – YE Mar-11	3 Year AAGR [^]
WA				
Estimated Spend (\$ Mil)	\$101	\$137	35.6%	N/A
Estimated Visitors	21,300	24,100	13.1%	23.5%
Estimated Nights	1,366,000	1,242,500	-9.0%	5.0%
National				
Estimated Spend (\$ Mil)	\$2,390	\$2,576	7.8%	N/A
Estimated Visitors	462,900	530,300	14.6%	21.4%
Estimated Nights	25,253,600	25,653,800	1.6%	10.4%

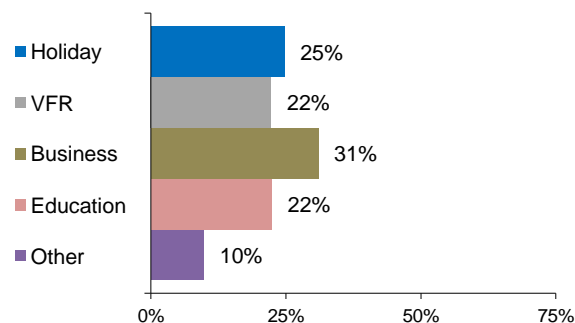
Estimated Visitors ('000)



Visitor Dispersal



Purpose of Visit



¹ Tourism Research Australia – International Visitor Survey (visitors aged 15+ years).

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

China Sample Size: 252, CI Visitors +/- 28.3%, CI Nights +/- 40.3%.

[^] AAGR = Average Annual Growth Rate

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Definitions

- **Average Annual Growth Rate (AAGR)**
 - Calculation of the average annual percent increase / decrease over a specified period of years.
- **Foreign Nationals**
 - International arrivals and passengers excluding Australian passport holders. This figure includes Australian residents travelling on foreign passports.
- **Market Share (Western Australia)**
 - Western Australia's market share (percent) of total visitors from the specified country who come to Australia.
- **Occupancy Rate**
 - Rooms sold divided by rooms available.
- **Passengers (PAX)**
 - Total Passengers including arrivals and departures.
- **Revenue Passengers**
 - Full fare paying passengers only (does not include non revenue passengers).
- **Revenue Per Available Room (RevPAR)**
 - Room revenue divided by rooms available (occupancy times average room rate will closely approximate RevPAR).

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Sources Used

- **Australian Bureau of Statistics**
 - Survey Tourist Accommodation (STA)
 - Catalogue 8635.5.55.001 *Tourism Accommodation, Small Area Data, Western Australia*
 - Data provides information on the supply of, and demand for, tourist accommodation in Western Australia.
 - Overseas Arrivals and Departures
 - Western Australian Residents Departing on a Short-term Basis by Mode of Transport by Reason for Journey by Top 20 Countries of Intended Stay and Total Departures.
- **Bureau of Transport and Regional Economics (BITRE)**
 - Provides economic analysis, research and statistics on infrastructure, transport, regional development and local government issues.
 - Domestic City Pair Data – Top 50 Domestic Australian Routes
- **Department of Immigration and Citizenship (DIAC)**
 - The department's key objectives, as set out in *The DIAC Plan* are to:
 - Manage the lawful and orderly entry and stay of people in Australia, including through effective border security.
 - Promote a society which values Australian citizenship, appreciates cultural diversity and enables migrants to participate equitably.
- **Roy Morgan Research**
 - Roy Morgan Research is an international market research company and the provider of the Holiday Travel Survey. A subscription service that Tourism WA purchases at intervals.
 - Roy Morgan Consumer Confidence
 - The Roy Morgan Consumer Confidence Rating is 100.0 plus the simple un-weighted average of the difference between the percentage of respondents who give a favourable answer and those who give unfavourable answers to five key questions
 - Roy Morgan Consumer Confidence rating is based on 1,050 face-to-face interviews conducted Australia-wide with men and women aged 14 and over.
- **STR Global**
 - STR Global provides monthly, weekly, and daily STAR accommodation benchmarking reports.
 - STR Global collects their members' data only.
- **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 in their homes using random digit dialling and Computer Assisted Telephone Interviewing system.

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- **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.
- The associated sample sizes and confidence intervals of the Overnight Visitor Surveys and Regional Expenditure Estimates for the **year ending March 2012** are outlined below:

Sample Size		
	Regional Expenditure Estimates	Overnight Visitor Survey
Intrastate	3,943	3,737
Interstate		553
International	5,558	6,620

Confidence Interval at 95%			
	Regional Expenditure Estimates	Overnight Visitor Survey Visitors	Overnight Visitor Survey Visitor Nights
Intrastate	± 4.7%	± 6.5%	± 10.4%
Interstate		± 12.4%	± 14.1%
International	± 5.8%	± 5.6%	± 8.6%

- **Tourism WA Brand Tracker**

- An important focus for Tourism WA is to promote Western Australia to key target markets and to provide information about the State as a travel and holiday destination. One of the methods used to measure the success of our marketing activities is to measure public awareness, knowledge of, intention to visit, actual visitation and perceptions of Western Australia as a travel destination in these markets. Tourism WA's Brand Tracking Study tracks such measures in the Perth, Melbourne and Sydney markets. The study is conducted via an online methodology, with data collection taking place on a weekly basis.
- The key functions of the tracking study are to:
 - Capture aided and unaided recall of Western Australia advertising in the intrastate and interstate (Sydney, Melbourne) markets
 - Collect data on future travel intentions and gain insight into the travel decision-making process
 - Gain insight into the strength of current brand attributes
 - Learn about perceptions of Western Australia as a travel destination

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- **Perth Airport Pty Ltd**
 - Perth Airport Pty Ltd is a wholly-owned subsidiary of Airstralia Development Group and operates Perth Airport.
- **United Nations World Tourism Organisation (UNTWO)**
 - The World Tourism Organization (UNWTO/OMT) is a specialised agency of the United Nations and the leading international organisation in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how.
 - **Barometer:** The *UNWTO World Tourism Barometer* is a regular publication of the Market Intelligence and Promotion Department of UNWTO aimed at monitoring the short-term evolution of tourism and providing the sector with relevant and timely information.
 - The *UNWTO World Tourism Barometer* is published three times a year (January, June, and October). The first issue was published in June 2003.

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