

WA Tourism **PULSE**

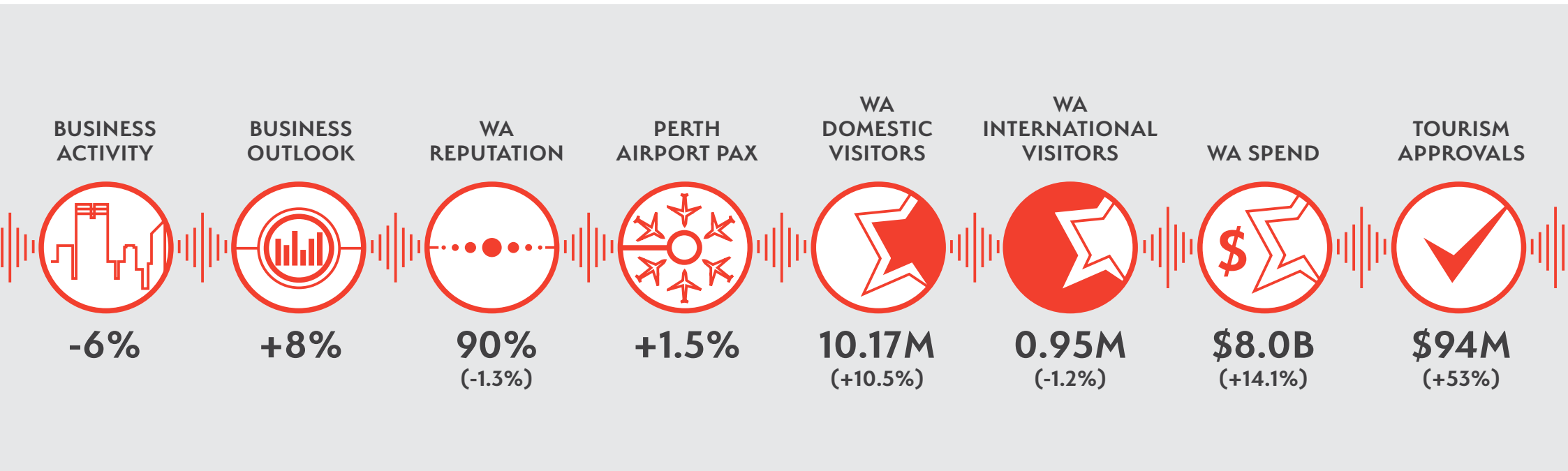
Current insights and future outlook for
tourism businesses and destinations.

Winter 2019



THE PULSE

LATEST DATA AVAILABLE JULY 2019



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The Tourism PULSE

The Tourism Pulse report provides businesses and destinations with:

- Relevant information on tourism prices, demand drivers, supply and investment.
- The most recent public information on tourism activity.
- Exclusive additional data and information from Tourism Council WA.
- Data from more than 10 sources and surveys consolidated into a single report.
- Regional level data, and information for different types of businesses, wherever possible.
- Insights and outlook on current and future tourism activity.

How to use the Information

Tourism businesses and destinations can use this report to benchmark their own performance against comparable business types, regions and the whole WA tourism market. You may use this information to:

- Assess your competitiveness and areas for improvement.
- Analyse current and future demand for your business or region.
- Refocus your target markets, pricing and marketing efforts.
- Plan your investment in staff, product development, equipment and property.

Research Sponsors

The Tourism Pulse report is compiled by Tourism Council WA with independent analysis and commentary from Lucid Economics. The report is supported by key research sponsors Perth Airport and Crown Perth.



User Guide

Use the following symbols to quickly assess each data set.

Unless stated otherwise, the visitor figures in this report include: holiday makers, visiting friends & relatives, business, education and other purposes of visit. The visitor data only includes visitors staying overnight away from home and does not include day-trippers.

OS INTERNATIONAL – OVERSEAS VISITORS

This data includes international visitors staying overnight in Western Australia. International visitors make up approximately 8% of overnight visitors and spend approximately \$2,300 per trip.

AUS INTERSTATE – AUSTRALIAN VISITORS

This data includes interstate visitors staying overnight in Western Australia. Interstate visitors make up approximately 14% of overnight visitors and spend approximately \$1,000 per trip.

WA INTRASTATE – WESTERN AUSTRALIAN VISITORS

This data includes Western Australian intrastate visitors staying overnight in Western Australia. Intrastate visitors make up approximately 78% of overnight visitors and spend approximately \$500 per trip.

OO OUTLOOK

This data provides an estimate or forecast of future tourism activity. These estimates can be based on current or lagging data. Usually the more short-term the outlook, the more reliable the estimate.

OOO CURRENT

This is the most recent data available on tourism activity. The data is available within 3 months of the period being reported and is the most current indicator of tourism activity.

OOO LAGGING

This data is not available until more than 3 months after the period being reported. Usually this data is more complete and provides the best information on trends in tourism activity.

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Glossary

Month Ending (M/E) means the month reported or as at the last day of the month reported.

Change % means the percentage change between the M/E and the same M/E in the previous year.

Quarter Ending (Q/E) means the 3 calendar months to the end of the period. **Change %** means the percentage change between the Q/E and the same Q/E in the previous year.

Year Ending (Y/E) means the 12 months to the end of the period. **Change %** means the percentage change between the Y/E and the previous Y/E.

PAX means the number of passengers or persons arriving, including Western Australians returning home and **inbound** international, interstate and intrastate visitors; plus departures of **outbound** Western Australians and international, interstate and intrastate visitors returning home.

Perth means the Perth metropolitan areas, not the Experience Perth Tourism Region, unless otherwise stated.

Accommodation Operator means all **Tourism Businesses** which are primarily short stay accommodation providers. Includes: hotels, motels, resorts, camping & caravan parks, B&Bs / hosted, backpackers / hostels, self-catered and chalet accommodation. Data for Accommodation Operators is used when the data sample is not large enough to report information for each type of accommodation.

Tourism Operator means all **Tourism Businesses** and organisations which are not primarily accommodation operators. Tourism Operators include **Tour and Transport** businesses which provide passenger transport services and/or land, water and air tours. Tourism Operators also includes other **Attractions and Events** including leisure facilities, convention & event venues, breweries & wineries, visitor centres and tourism retail and specialist services. Data for Tourism Operators is used when the data sample is not large enough to report information for specific types of tourism operator.

Tourism Businesses means a public or private sector organisation which actively promotes a product to visitor markets and/or take bookings from visitors. Tourism businesses are those businesses which are promoted or distributed to visitors via channels such as Tourism WA, Regional Tourism Organisations, Visitor Centres / Local Tourism Associations, traditional and digital media and/or take bookings direct from visitors. For the purposes of this report Tourism Businesses does not include businesses such as retailers or service stations which benefit from visitor spending but are not actively in the visitor market.

Disclaimer

This Report is intended as a source of information for general purposes only. The information, statements, statistics and commentary contained in this Report have been prepared from publicly available material and from surveys conducted and commissioned by Tourism Council WA and are current as at August 2019. Tourism Council WA does not express an opinion as to the accuracy or completeness of the information provided, the assumptions made by the parties that provided the information or any conclusions reached by those parties. Accordingly, no reader should act or rely upon this Report for any reason without making their own further enquiries, investigations and obtaining specific professional advice.



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