

Review of WA Intrastate Aviation Services

Tourism Focus

Steve Crawford
Director Policy and Planning
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Economic Contribution of Tourism to WA

	Gross Value Added (\$b)	Gross State Product (\$b)	Employment
Direct	3.0	3.6	43,300
Indirect	1.9	2.1	19,700
Total	4.9	5.7	63,000

Source: Access Economics (Tourism Satellite Account), 2005-06

Growth in Tourism's Economic Contribution to WA

	2001/02	2005/06	% change
Total GVA	\$3.8	4.9	29%
Total GSP	\$4.5	\$5.7	27%
Total Employment	63,100	63,000	0%

Source: Access Economics (Tourism Satellite Account)

Transport (and storage) Industry Reliance on Tourism in WA

Tourism's direct contribution to GVA (\$m)	% industry reliance on tourism	Employment
\$717m	21%	7,100

Source: Access Economics (Tourism Satellite Account)

Visitors in Western Australia

Year ending December 2007

\$4,990 million Spend **7,304,700 Visitors** 50,592,000 Nights

Intrastate Market

\$2,233 mil spend

5,161,000 visitors

20,313,000 nights

Reason for visit

Holiday = 45%

VFR = 31%

Business = 19%

Region of origin

Experience Perth = 65%

Australia's South West = 19%

Australia's Golden Outback = 7%

Australia's Coral Coast = 5%

Australia's North West = 3%

Interstate Market

\$1,142 mil spend

1,218,000 visitors

12,370,000 nights

Reason for visit

Holiday = 35%

VFR = 24%

Business = 42%

State of origin

VIC = 33%

NSW = 28%

QLD = 18%

SA = 11%

Other = 10%

International Market

\$1,615 mil spend

655,700 visitors

17,908,000 nights

Reason for visit

Holiday = 54%

VFR = 35%

Business = 15%

Country of Origin

UK = 25%

Singapore = 10%

New Zealand = 8%

Japan = 7%

USA = 7%



Source: Tourism Research Australia,
National/International Visitor Survey (visitors aged 15+ years)

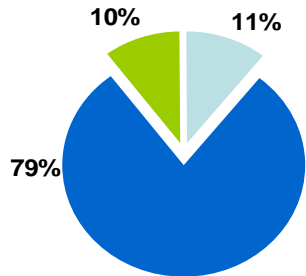


Regional Market Breakdown

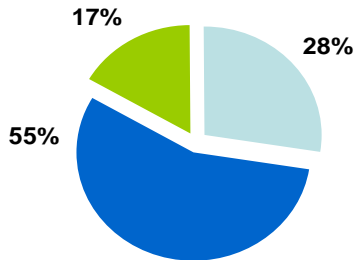
12 months ending December 2007

- Intrastate
- Interstate
- International

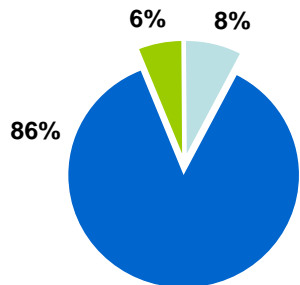
Australia's Coral Coast
632,600 Visitors



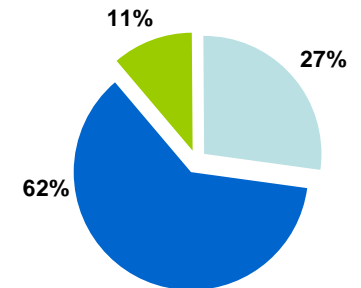
Experience Perth
3,757,300 Visitors



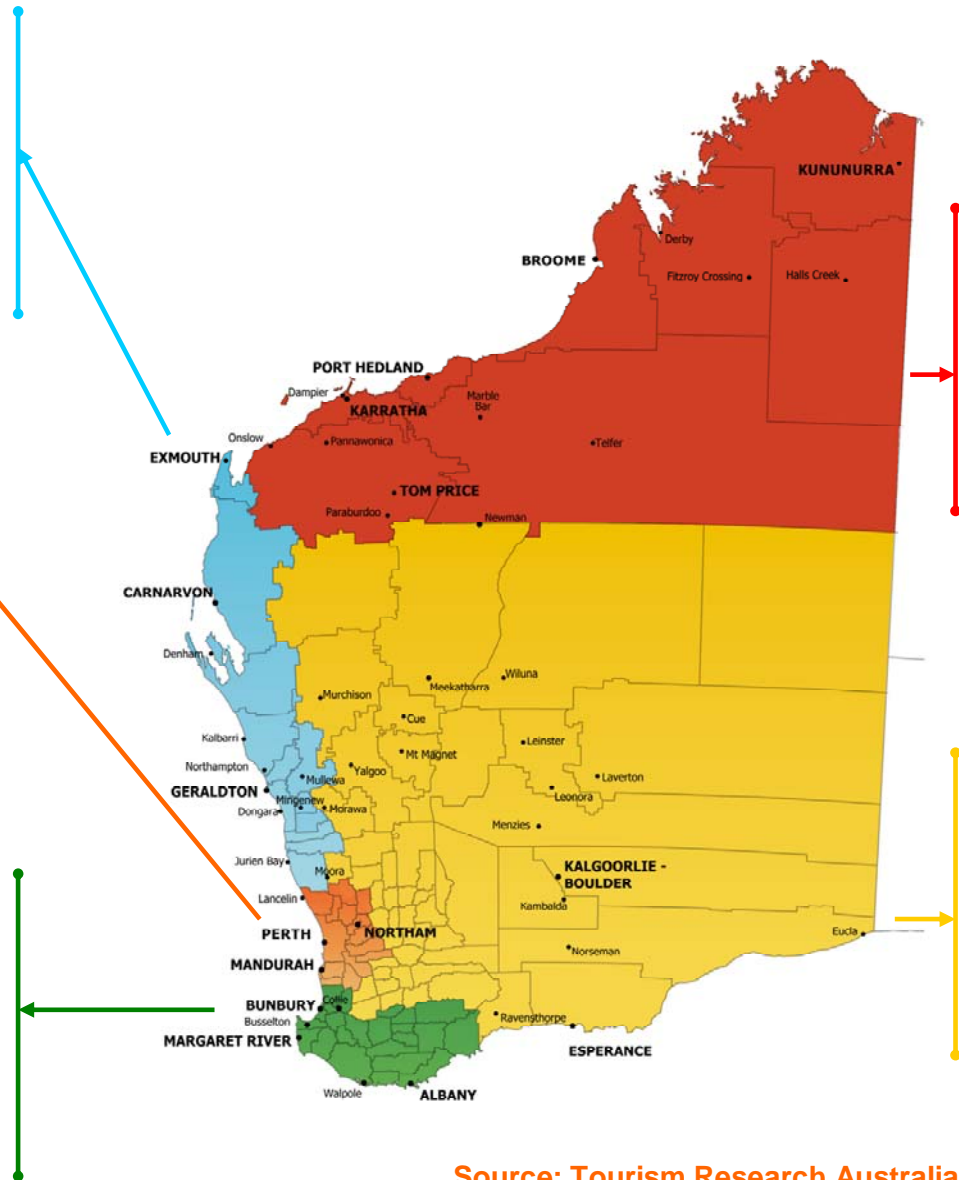
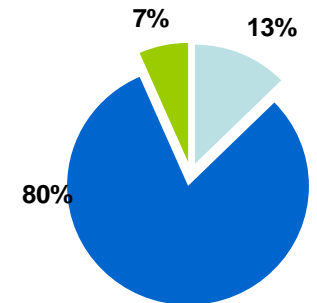
Australia's South West
2,078,700 Visitors



Australia's North West
568,900 Visitors

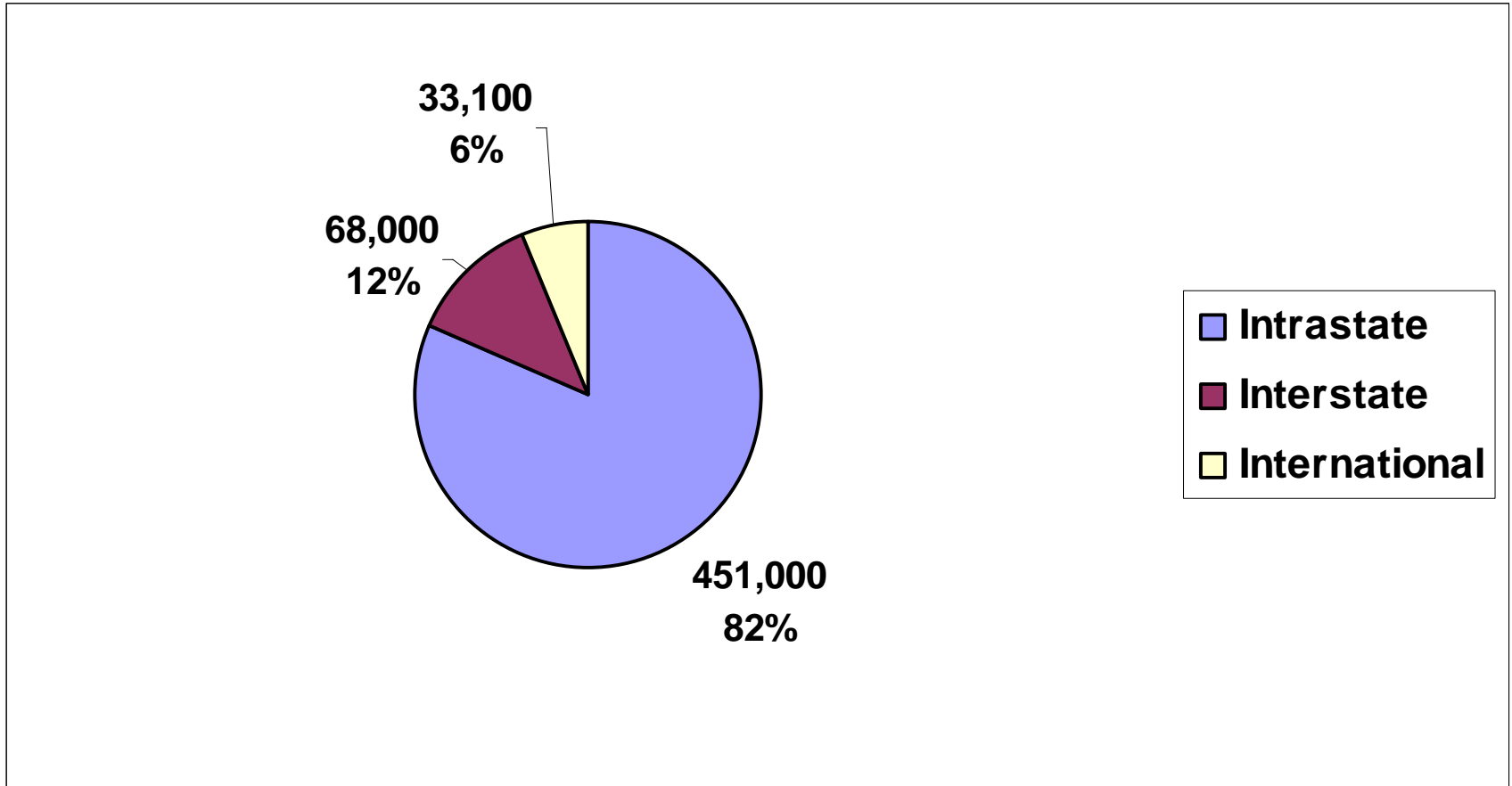


Australia's Golden Outback
789,900 Visitors

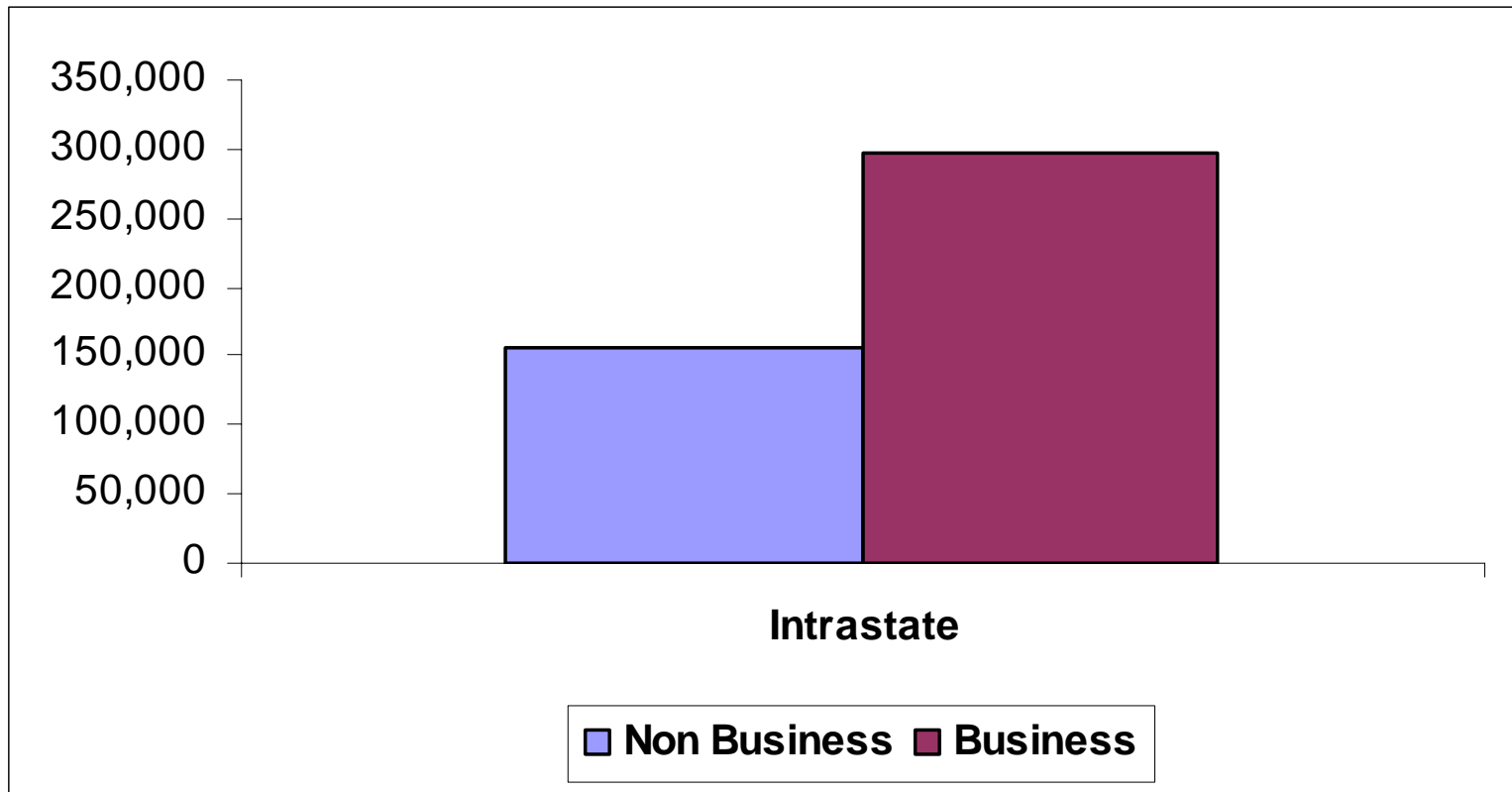


Source: Tourism Research Australia, National/International Visitor Survey (visitors aged 15+ years)

Overnight Visitors Travelling By Air Within WA 2007

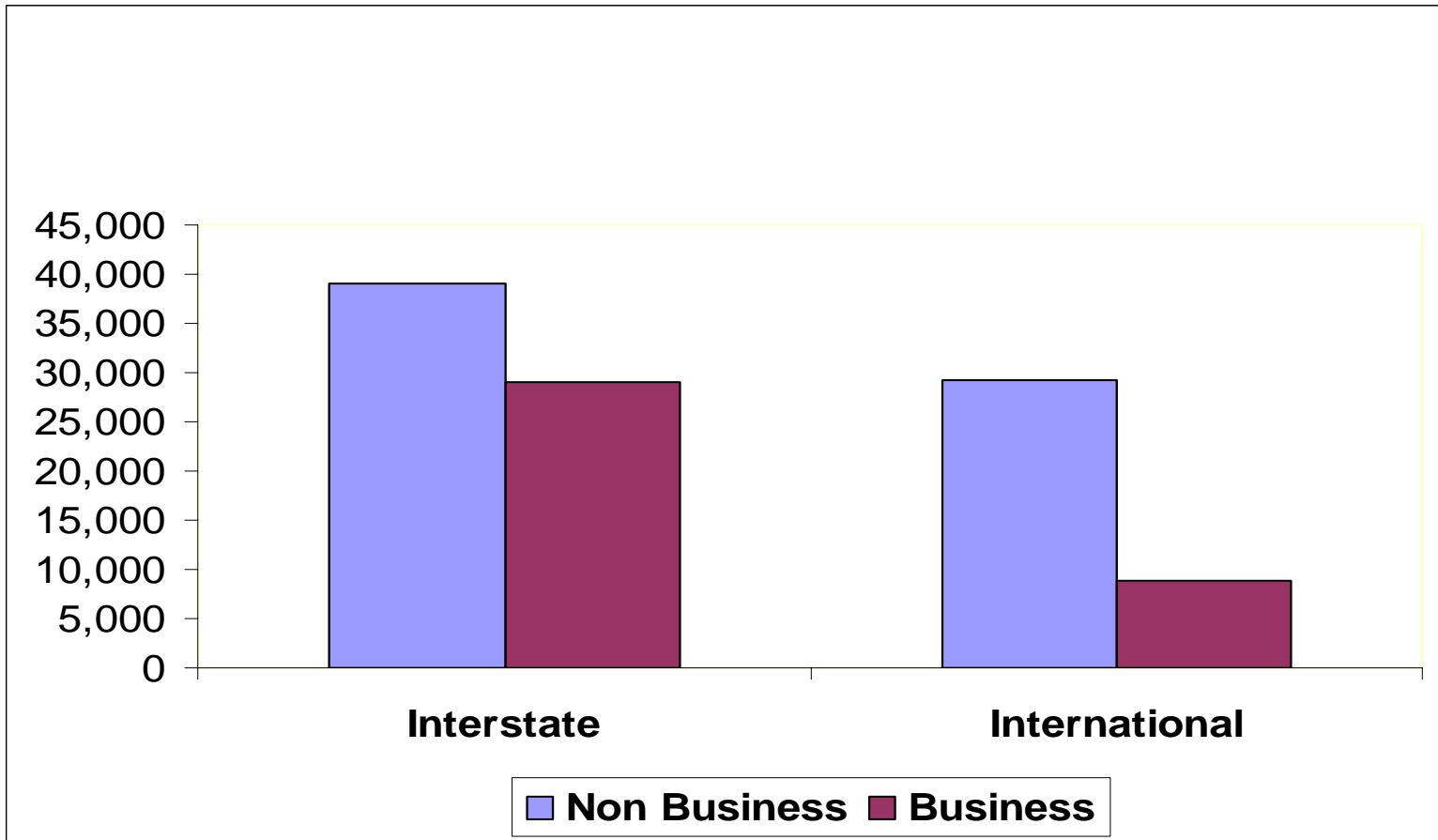


Intrastate Overnight Visitors Travelling by Air within WA 2007– Purpose of Visit

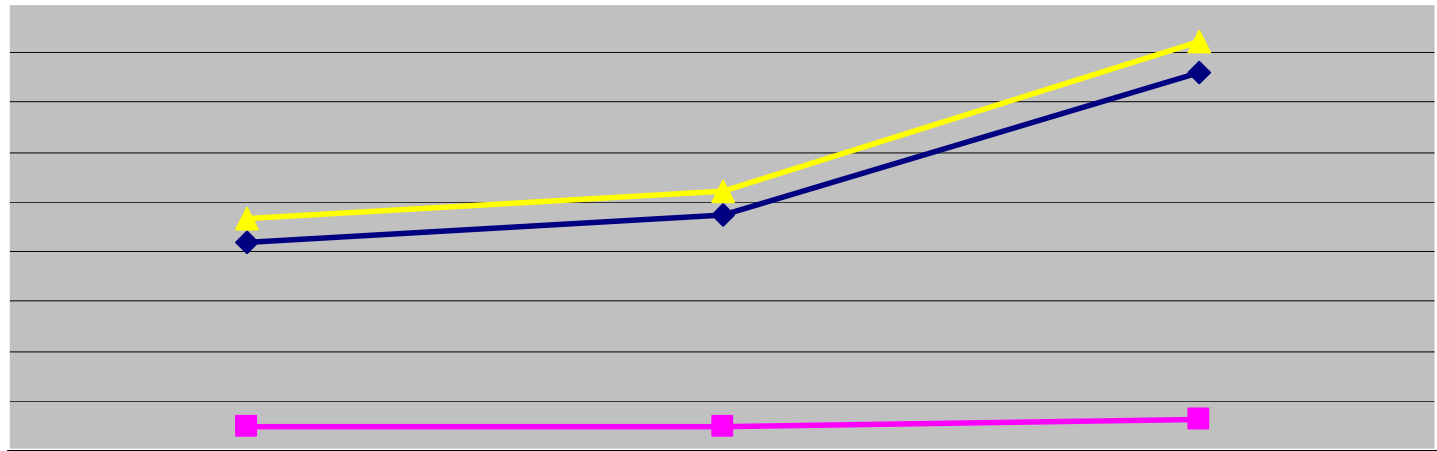


Interstate and International Overnight Visitors

Travelling by Air within WA 2007– Purpose of Visit



Visitors by Air to Coastal Network Locations (3 yr rolling annual average)



	Annual Average 1999/00/01	Annual Average 2002/03/04	Annual Average 2005/06/07
◆ Domestic	42,000	47,300	76,000
■ International	4,800	4,800	6,400
▲ Total	46,800	52,100	82,400

◆ Domestic ■ International ▲ Total

Purpose of visit by Air Visitors to WA Coastal Network Locations

	Annual Average 2000 - 2003	Annual Average 2004 - 2007	% change
Domestic			
Business	27,000	33,800	25%
Non Business	13,300	32,800	147%
Total	41,500	66,500	60%
International			
Non Business	3,400	4,500	32%
Business	300	1,200	300%
Total	3,800	6,300	66%

NB: Multiple purpose of visits are possible

Tourism Forecasts

- **Inbound to Australia:**

- 8.9 million visitors by 2016 (aagr 2.9% 1996-2006)
- \$35 billion in real terms by 2016 (aagr 4.6%)

- **Domestic:**

- 1.6% aagr visitor trips by 2016
- \$68.7 billion in real terms

NB: State-based forecasts not available

Source: Tourism Forecasting Committee.

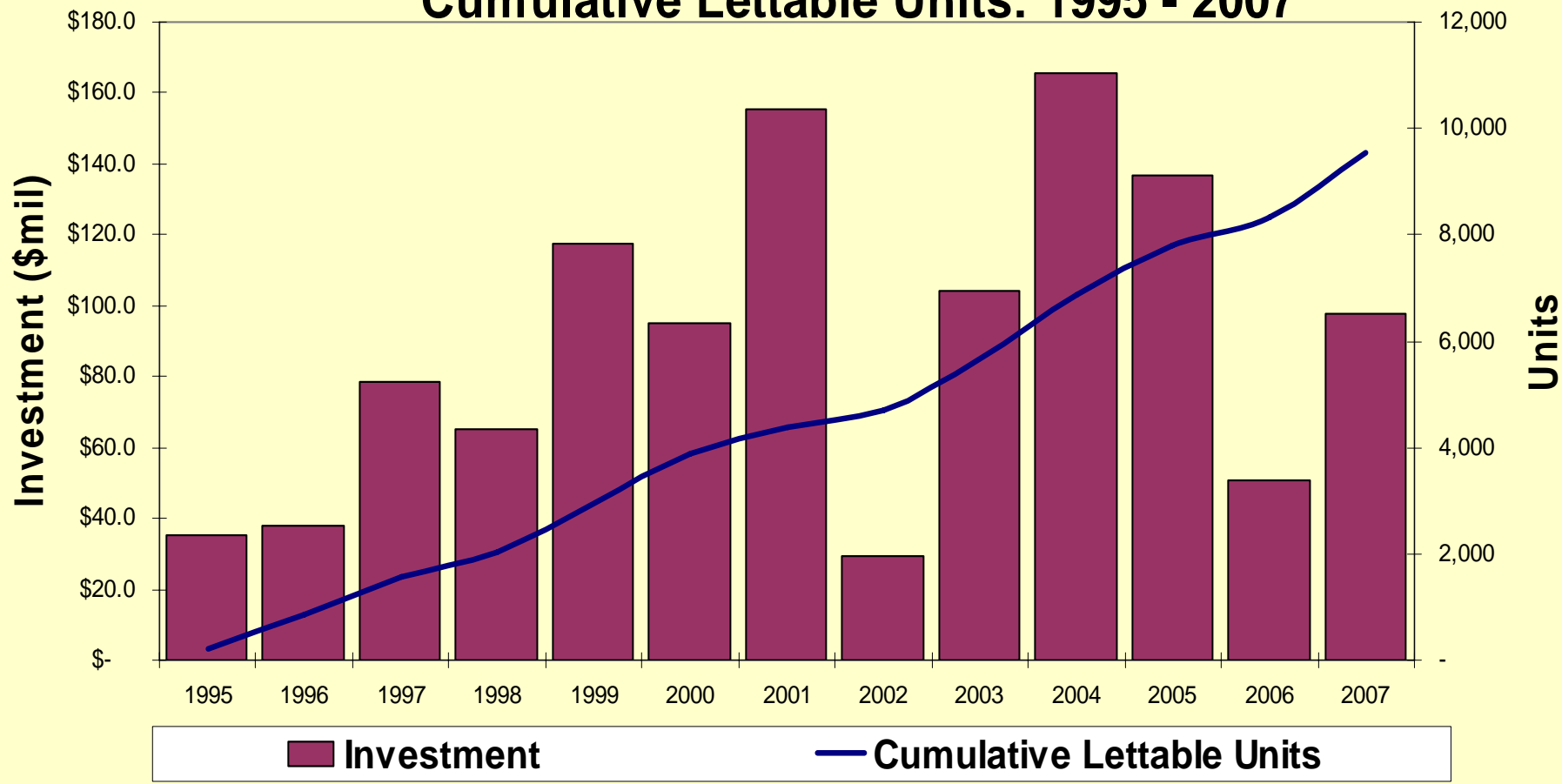
Tourism Projects in Construction Stage

REGION	No. of PROJECTS	COST (\$ million)	LETTABLE UNITS
EXPERIENCE PERTH	8	95.7	325
AUSTRALIA'S NORTH WEST	4	55	291
AUSTRALIA'S CORAL COAST	9	73.7	344
AUSTRALIA'S SOUTH WEST	24	202.4	485
AUSTRALIA'S GOLDEN OUTBACK	3	1.2	14
TOTAL WESTERN AUSTRALIA	48	428	1,459

Tourism Projects in Planning Stage

REGION	No. of PROJECTS	COST (\$ million)	LETTABLE UNITS
EXPERIENCE PERTH	22	399.09	1,364
AUSTRALIA'S NORTH WEST	9	97.8	648
AUSTRALIA'S CORAL COAST	17	228.2	1,245
AUSTRALIA'S SOUTH WEST	32	684.45	1801
AUSTRALIA'S GOLDEN OUTBACK	7	53.8	348
TOTAL WESTERN AUSTRALIA	87	1,463.34	5,406

Accommodation Investment and Cumulative Lettable Units: 1995 - 2007



We are seeing

- Massive investment in the South West and Broome
- Emergence of key hubs eg Broome
- Emergence of Ningaloo Coast