



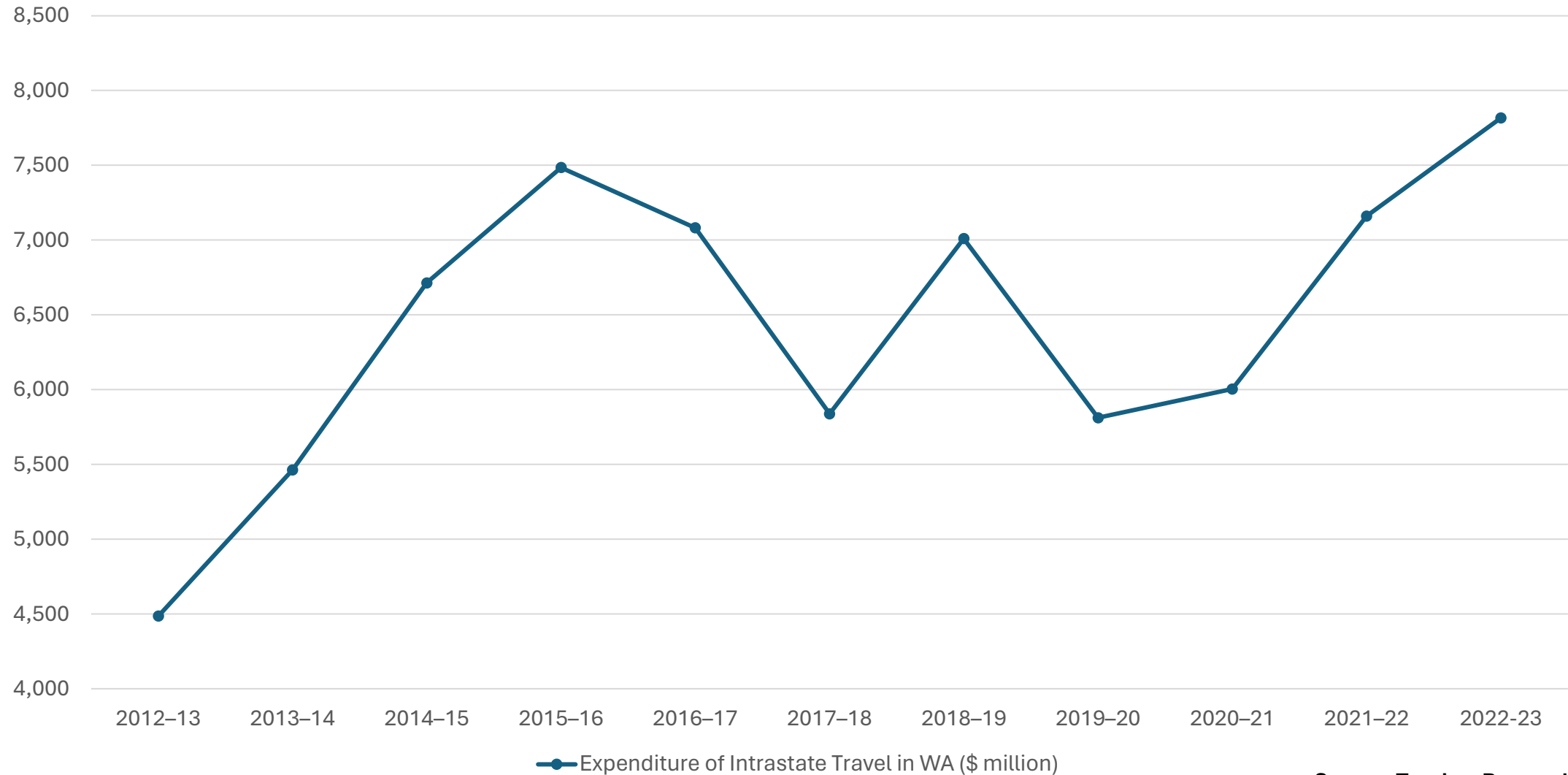
# Scene Setting - State of the Industry

Monday, 10 June 2024

# State of the Industry Report

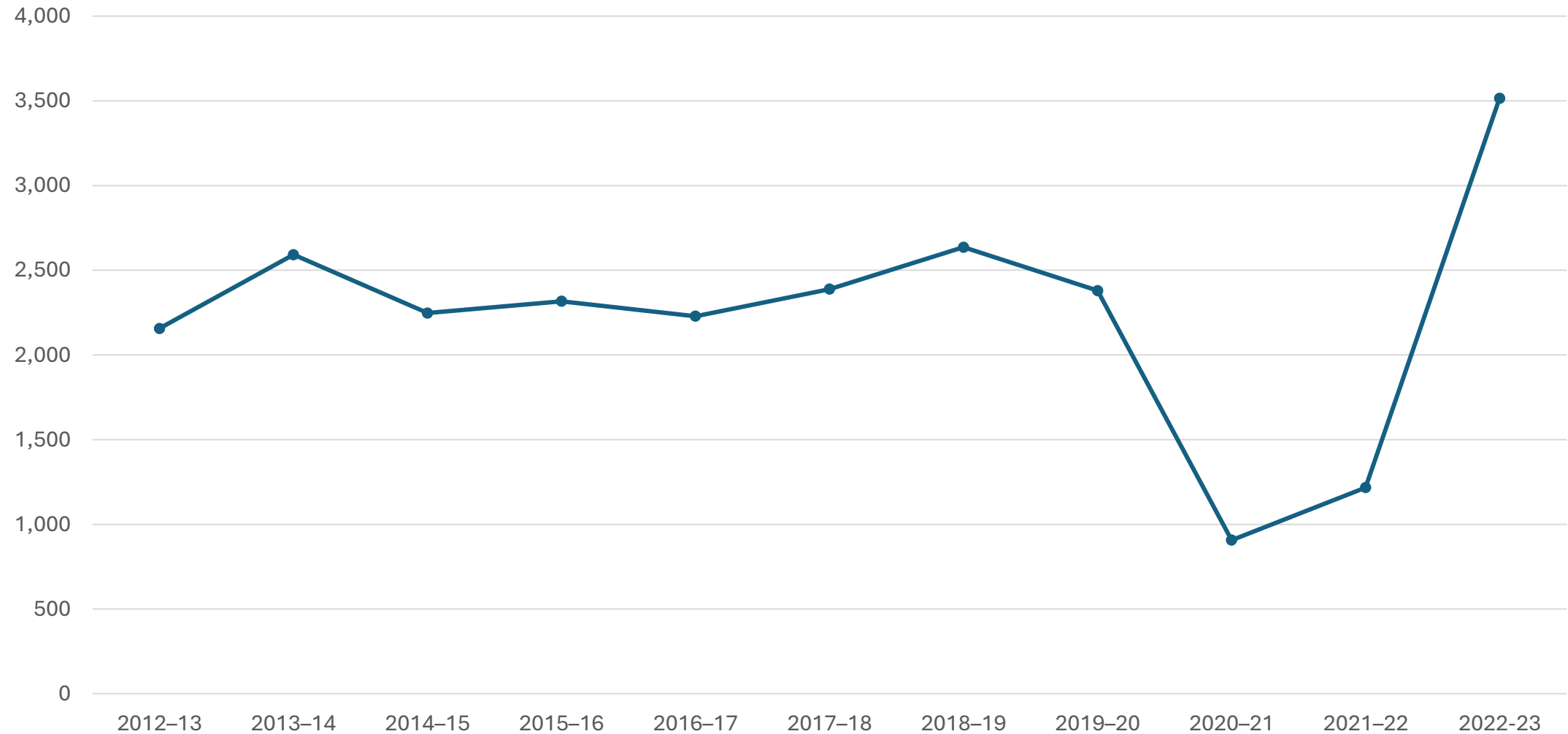
- 10 Year Story
- Latest Data 2023
- Current Business Activity
- WA Market Forecast

# 10 Year - Intrastate Spend (\$ million)



Source: Tourism Research Australia, State Tourism Satellite Accounts 2022/23

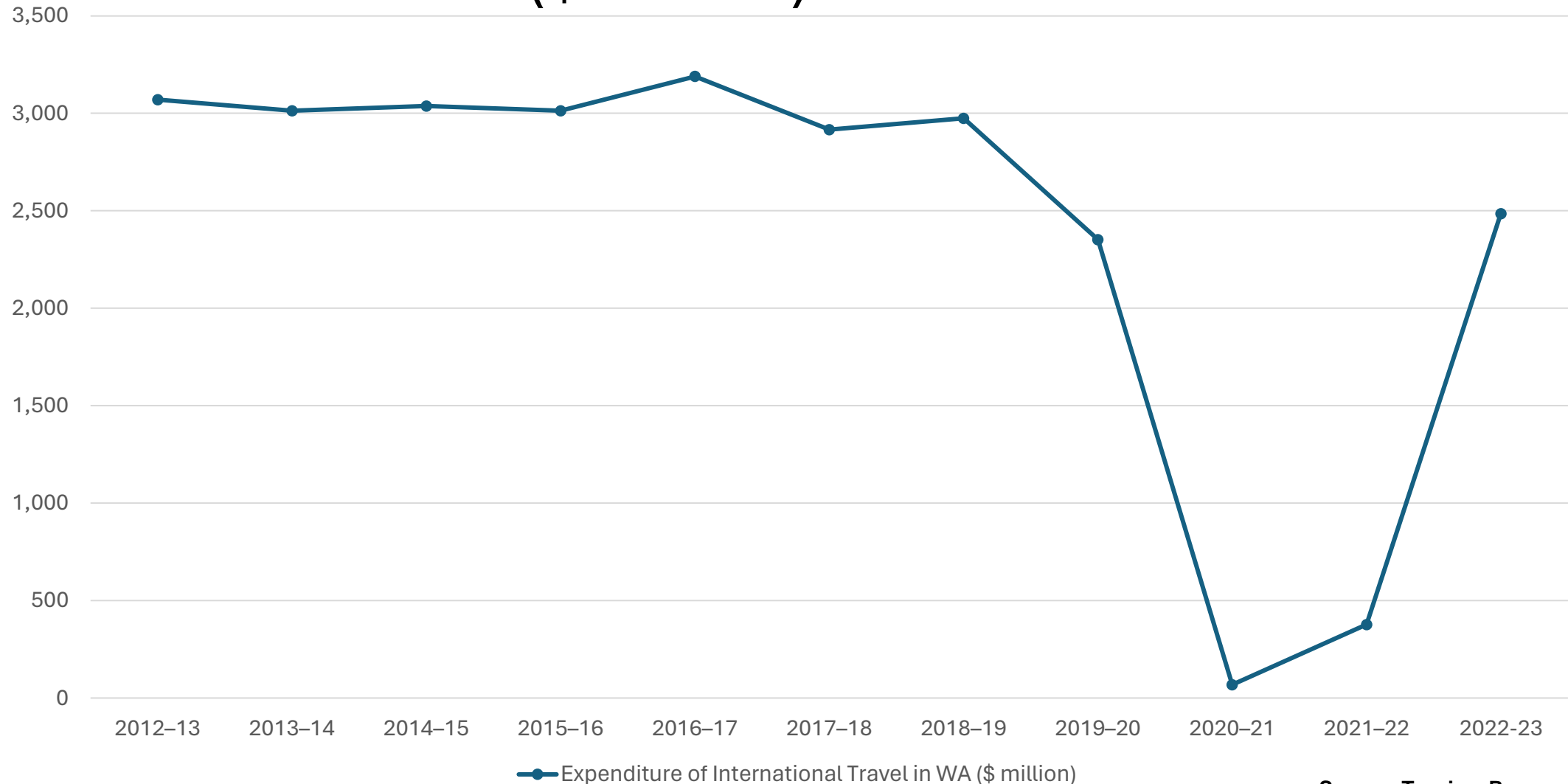
# 10 Year - Interstate Spend (\$ million)



—● Expenditure of Interstate Travel in WA (\$ million)

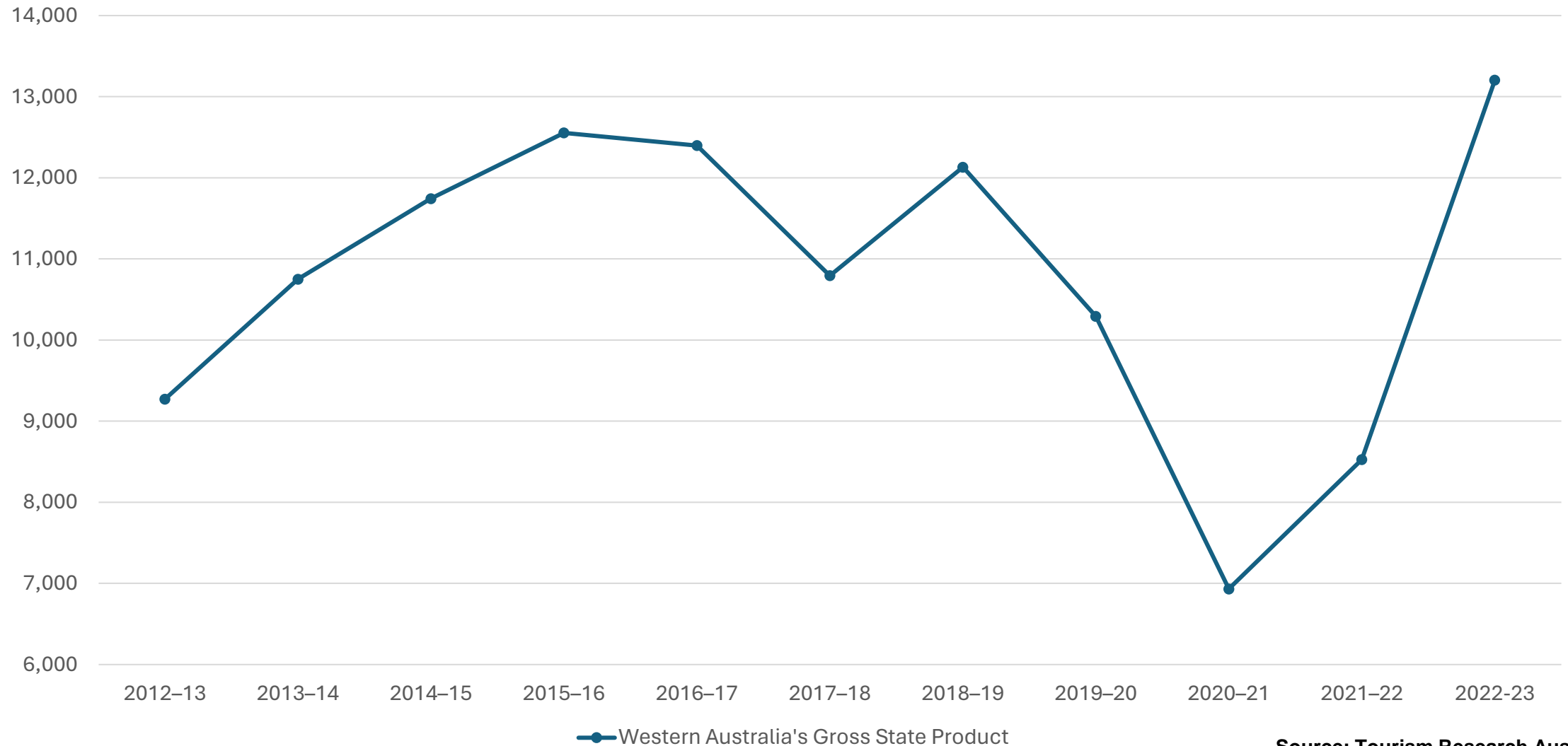
**Source: Tourism Research Australia,  
State Tourism Satellite Accounts 2022/23**

# Expenditure of International Travel into WA in the Last 10 Financial Years (\$ million)



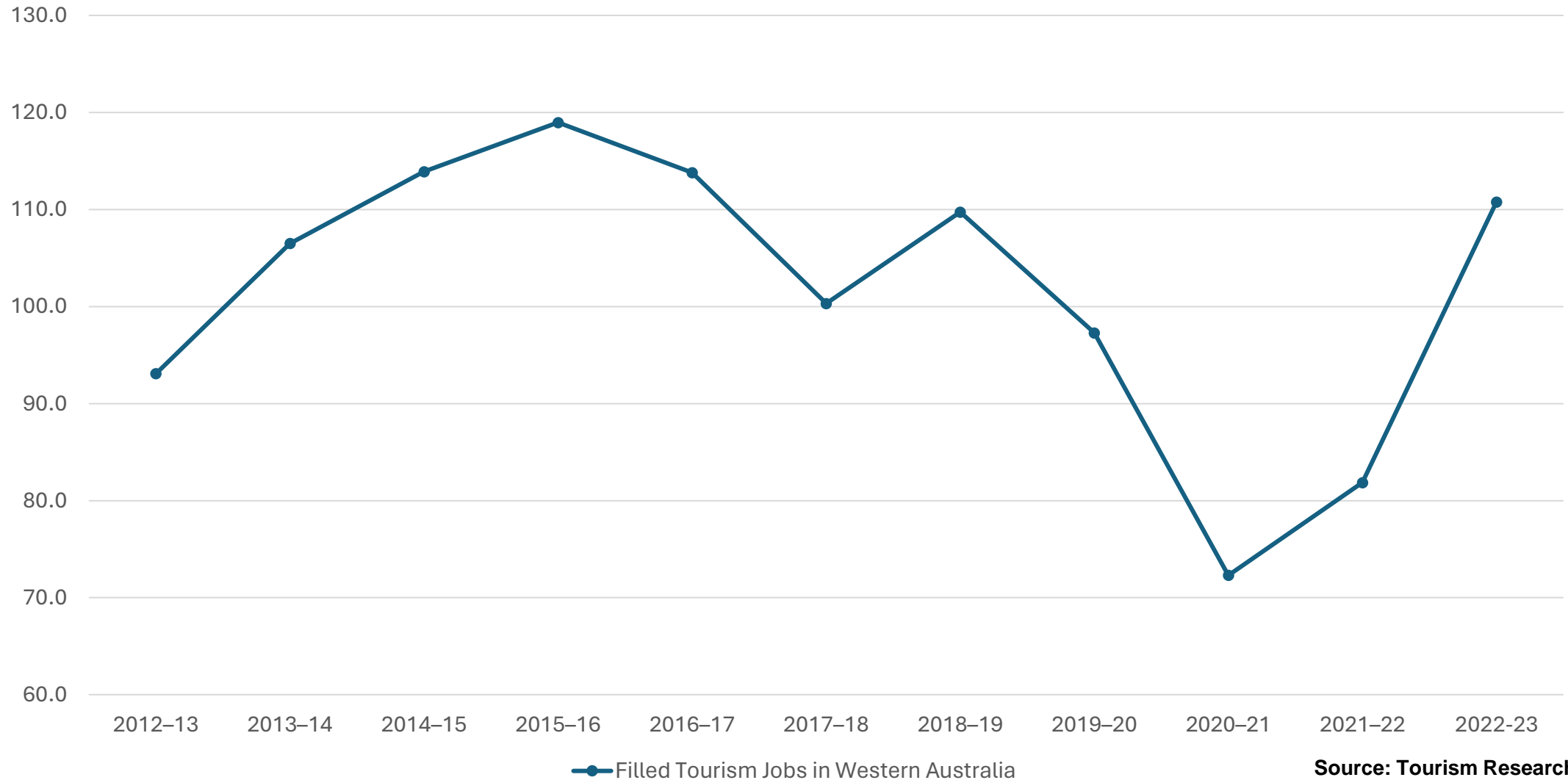
Source: Tourism Research Australia, State Tourism Satellite Accounts 2022/23

# 10 Years - Total Tourism GSP (\$ million)



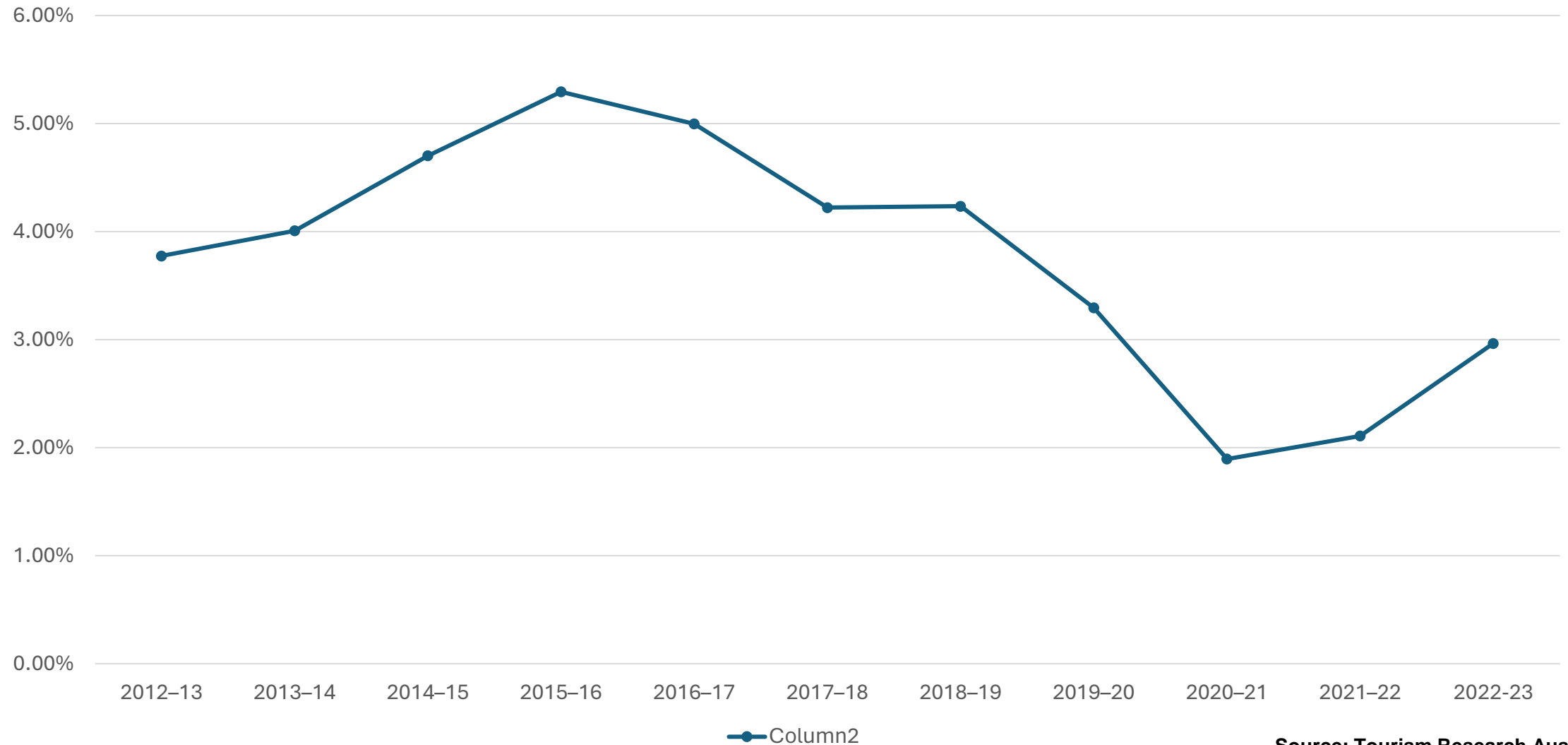
Source: Tourism Research Australia,  
State Tourism Satellite Accounts 2022/23

# 10 Years – Total Tourism Filled (FTE)



Source: Tourism Research Australia,  
State Tourism Satellite Accounts 2022/23

# 10 Years – Economic Diversity - % of GSP



Source: Tourism Research Australia,  
State Tourism Satellite Accounts 2022/23



# 2023 - End of the Recovery?

#WATC24

# Domestic - 2023

	<b>Visitor No.s (000s)</b>	<b>Visitors % 2019 v 2023</b>	<b>Spend % 2019 v 2023</b>
<b>Holiday</b>	4 402	3.9%	55.1%
<b>VFR</b>	2 697	-6.9%	35.6%
<b>Business</b>	3 450	0.5%	31.7%
<b>Other</b>	668	-2.8%	56.8%
<b>Total</b>	<b>11 074</b>	<b>0.5%</b>	<b>41.0%</b>

Source: Tourism Research Australia, National Visitor Survey 2019/23

# Intrastate - 2023

	<b>Visitor No. (000s)</b>	<b>Visitors % 2019 v 2023</b>
<b>Holiday</b>	3 923	5.0%
<b>VFR</b>	2 238	-9.4%
<b>Business</b>	2 730	10.1%
<b>Other</b>	601	-0.5%
<b>Total</b>	<b>9 388</b>	<b>2.4%</b>

Source: Tourism Research Australia, National Visitor Survey 2019/23

# Interstate - 2023

	<b>Visitor No. (000s)</b>	<b>Visitors % 2019 v 2023</b>
<b>Holiday</b>	479	-4.4%
<b>VFR</b>	459	7.6%
<b>Business</b>	720	-24.5%
<b>Other purpose</b>	np	np
<b>Total</b>	<b>1 686</b>	<b>-9.2%</b>

Source: Tourism Research Australia, National Visitor Survey 2019/23

# International - 2023

	<b>Visitors (000s)</b>	<b>% Change from 2019</b>
<b>Holiday</b>	466	-34.0%
<b>VFR</b>	335	-13.7%
<b>Business</b>	97	-25.8%
<b>Other</b>	97	19.6%
<b>Total</b>	<b>996</b>	<b>-21.2%</b>

Source: Tourism Research Australia, International Visitor Survey 2019/23

# Tourism Pulse Data Dashboard

March 2024 - Business Activity

June 2024 - WA Market Forecast



#WATC24

# State of the Industry - Market Takeouts

- Revenue at record high, prices sustainable?
- Intrastate leisure in decline!
- Interstate leisure almost recovered.
- Interstate business down, permanently?
- International students recovered but flatlined
- International leisure far from recovery.

# State of the Industry - Business Takeouts

- Invest in product marketing, even for the intrastate market.
- Work together at local destination level to drive intrastate demand.
- Develop your international product, sustainability and accessibility.
- Create greater value, reduce costs and manage risks.