

# The Pilbara Visitation and Catchment Study

September 2023



# Near is the Largest Source of Intelligence on People, Places & Products

Near partners with hundreds of thousands of mobile applications to collect and process mobile location and human movement data



# Using Mobile Tracking Data to Measure The Pilbara Visitation

Ailevon Pacific has partnered with **near** to quantify movements of people via their “ping” locations – a cutting edge way to monitor traffic as well as whereabouts via transportation modes including vehicles and aircraft.

For example:



mobile phone  
*pings* at a location  
in The Pilbara



Common Evening  
Location (typically  
where a phone is  
most often) of said  
mobile phone is  
Sydney, AU

Conclusion

A Sydney resident visited The Pilbara via  
any means of travel

# Advantages and Disadvantages to using Near data

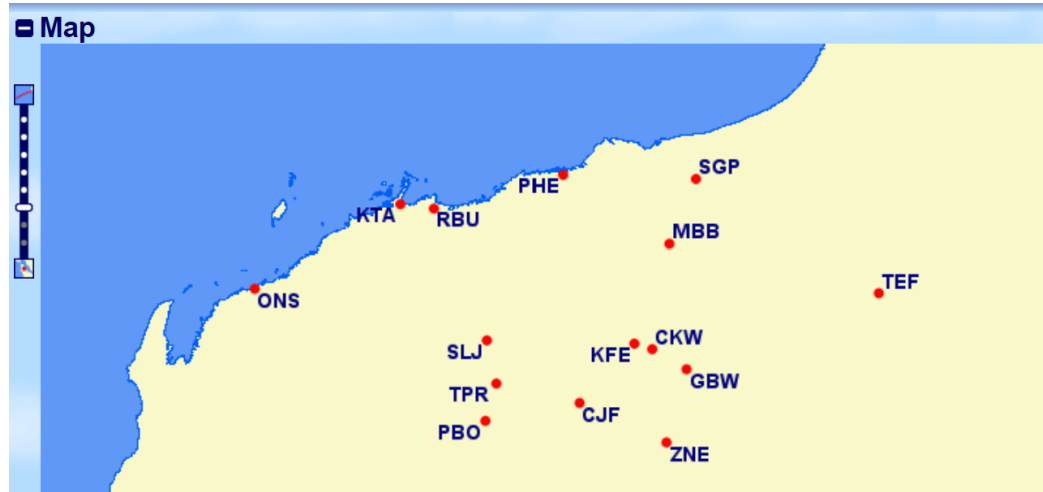
## Advantages

- Visitation by **any mode of transportation is tracked, capturing true market sizes not just air service sizes**
- Precise common evening and/or daytime location can be analyzed
- While only a small sample size of the population “pings” on Near’s network, Near has developed a methodology to attempt to true up visitation to true population sizes. Remember each time you use an app, a ping occurs – so the data points are in the billions!

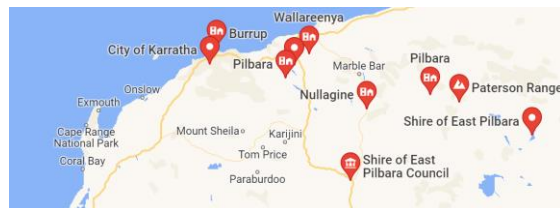
## Disadvantages

- Intra-Country Visitation: For a cell phone to “ping” on the Near network, a **domestic** user must be using a participating app with their location tracking enabled
- Country-to-Country Visitation: For a cell phone to “ping” on the Near network, an **international** user must be using a participating app **on Wi-Fi** with their location tracking enabled, hence international visitation is under-represented in the data and therefore displayed as % of total

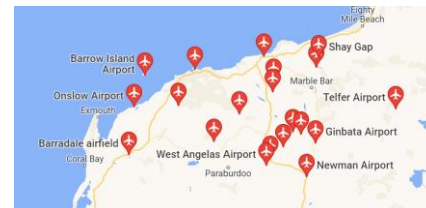
# Assessment location considerations



Selected Airports for assessment



Identified towns in The Pilbara Region



Identified airfields/airports

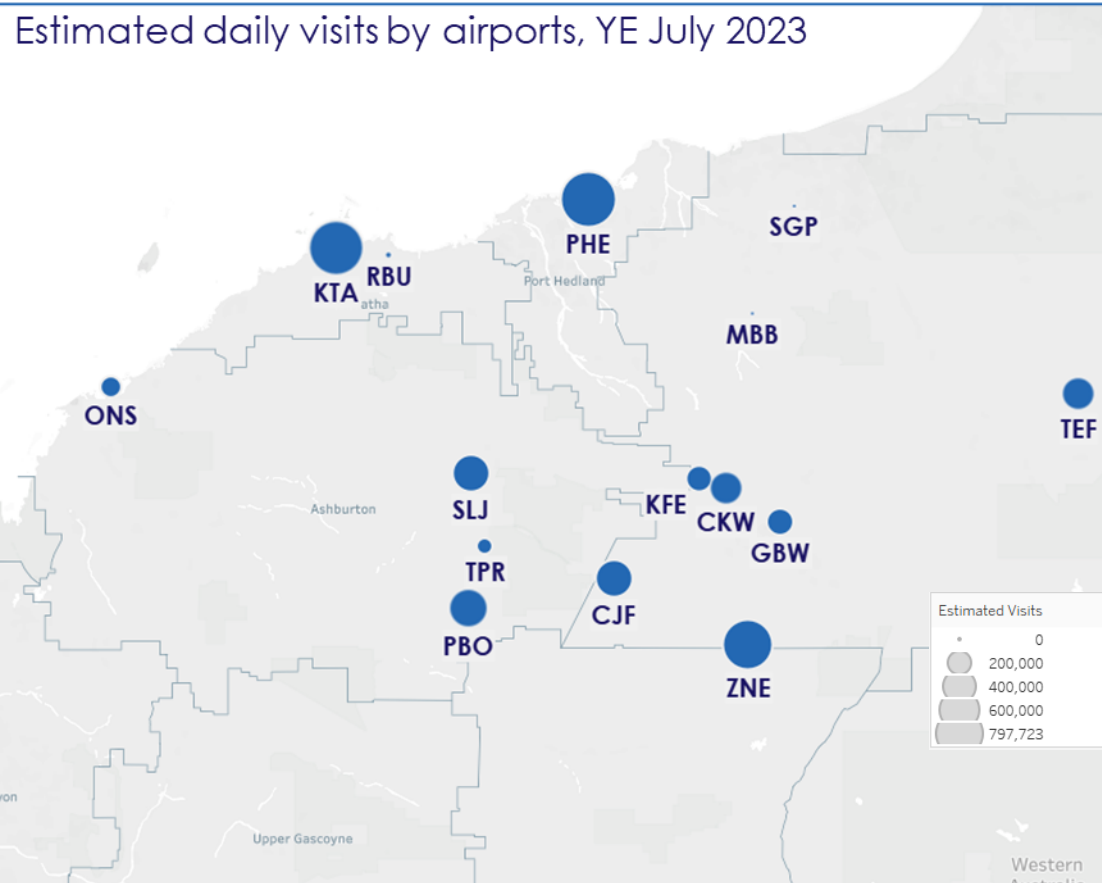
To ensure a simplified data assessment is completed, with billions of data points annually, key single points of assessment are selected initially. These are:

1. Port Hedland Airport terminal (PHE)
2. Karratha Airport terminal (KTA)
3. Newman terminal (ZNE)
4. Onslow (ONS)
5. Fortescue Dave Forrest Airport (KFE)
6. Coondewanna Airport (CJF)
7. Telfer Airport (TEF)
8. Solomon Airport (SLJ)
9. Ginbata Airport (GBW)
10. Paraburdoo Airport (PBO)
11. Marble Bar Airport (MBB)
12. Shay Gap (SGP)
13. Christmas Creek Airport (CKW)
14. Tom Price (TPR)
15. Roebourne Airport (RBU)

# Visitation to The Pilbara

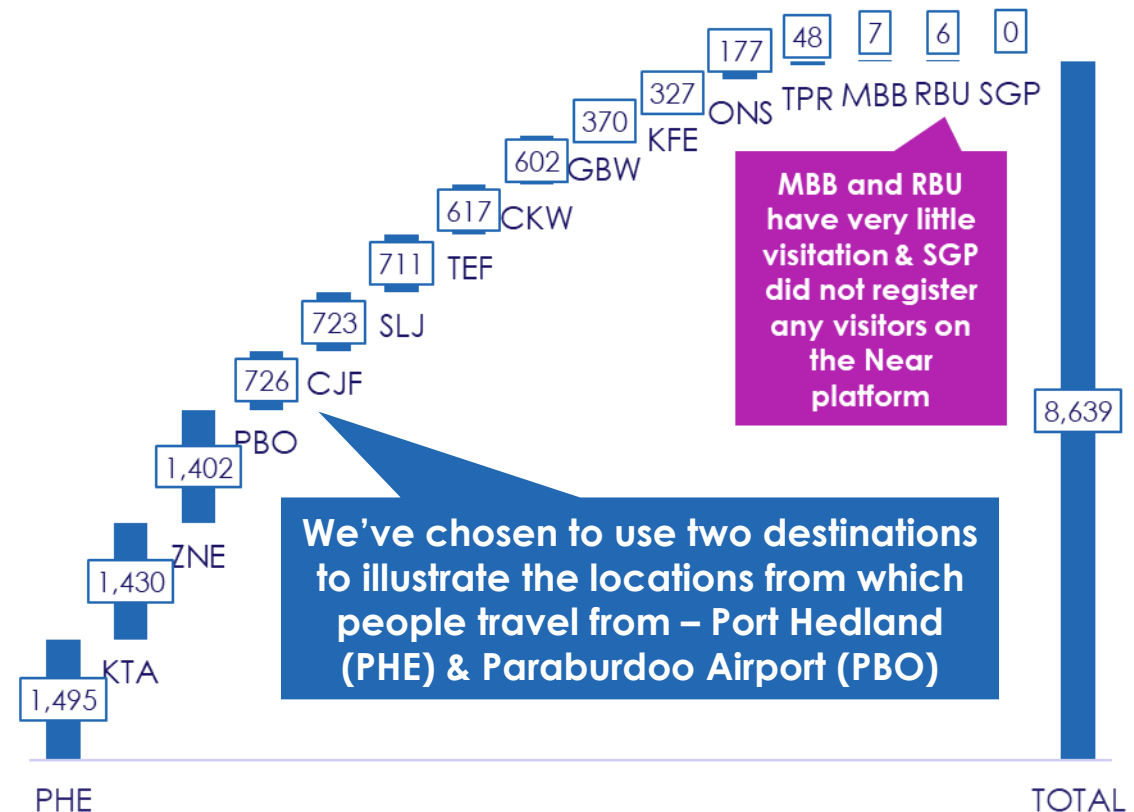
# Over 8,500 non-Pilbara AU residents visit The Pilbara daily, with the most visiting Port Hedland (PHE), KTA and ZNE

## HEAT MAP OF AU RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS



## AU RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by airport, YE July 2023



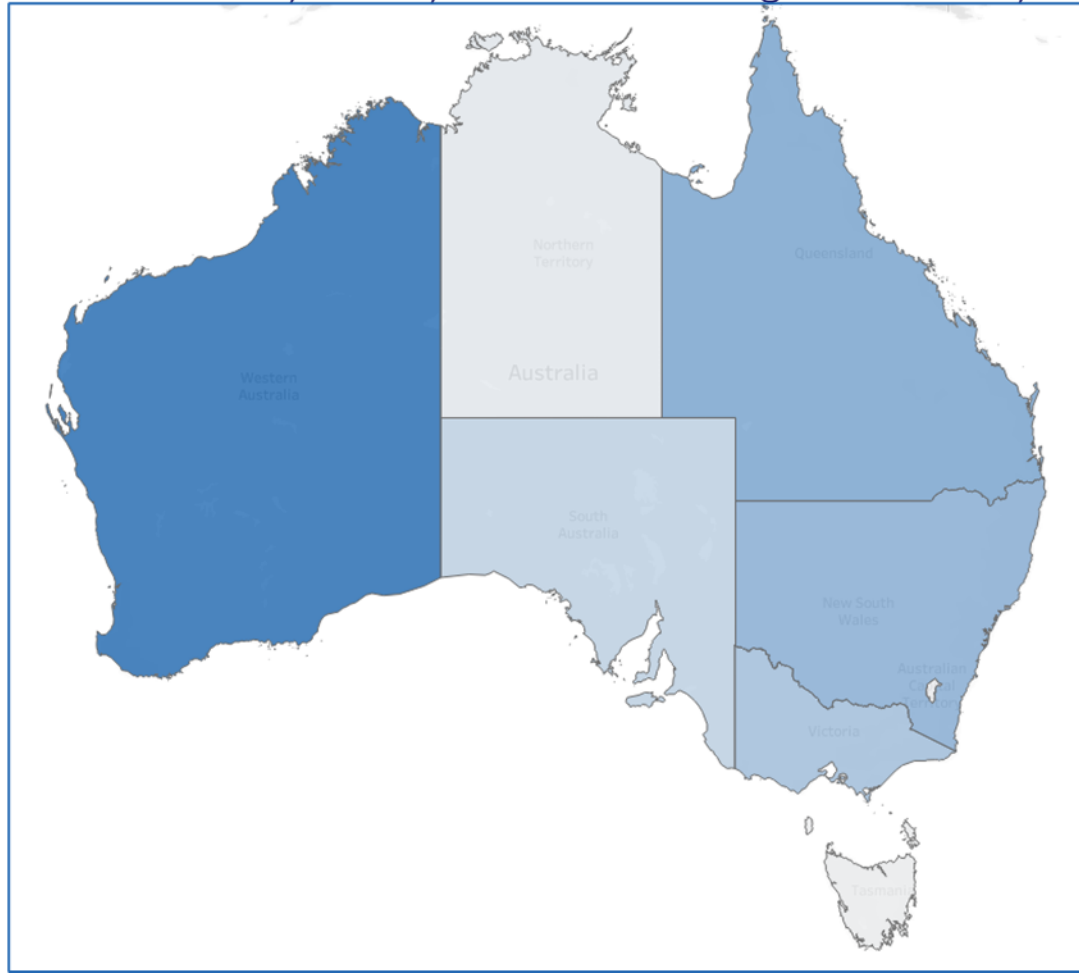
Note: Excludes residents of The Pilbara

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# 95% of visitation comes from Western Australia residents

## HEAT MAP OF AU RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by common evening state/territory, YE July 2023



State/Territory	Estimated Daily Visits	% of Total
Western Australia	8,178	95%
Queensland	146	2%
New South Wales	127	1%
Victoria	95	1%
South Australia	60	1%
Northern Territory	16	0%
Australian Capital Territory	8	0%
Tasmania	7	0%
<b>Total</b>	<b>8,639</b>	<b>100%</b>



Note: Excludes residents of The Pilbara

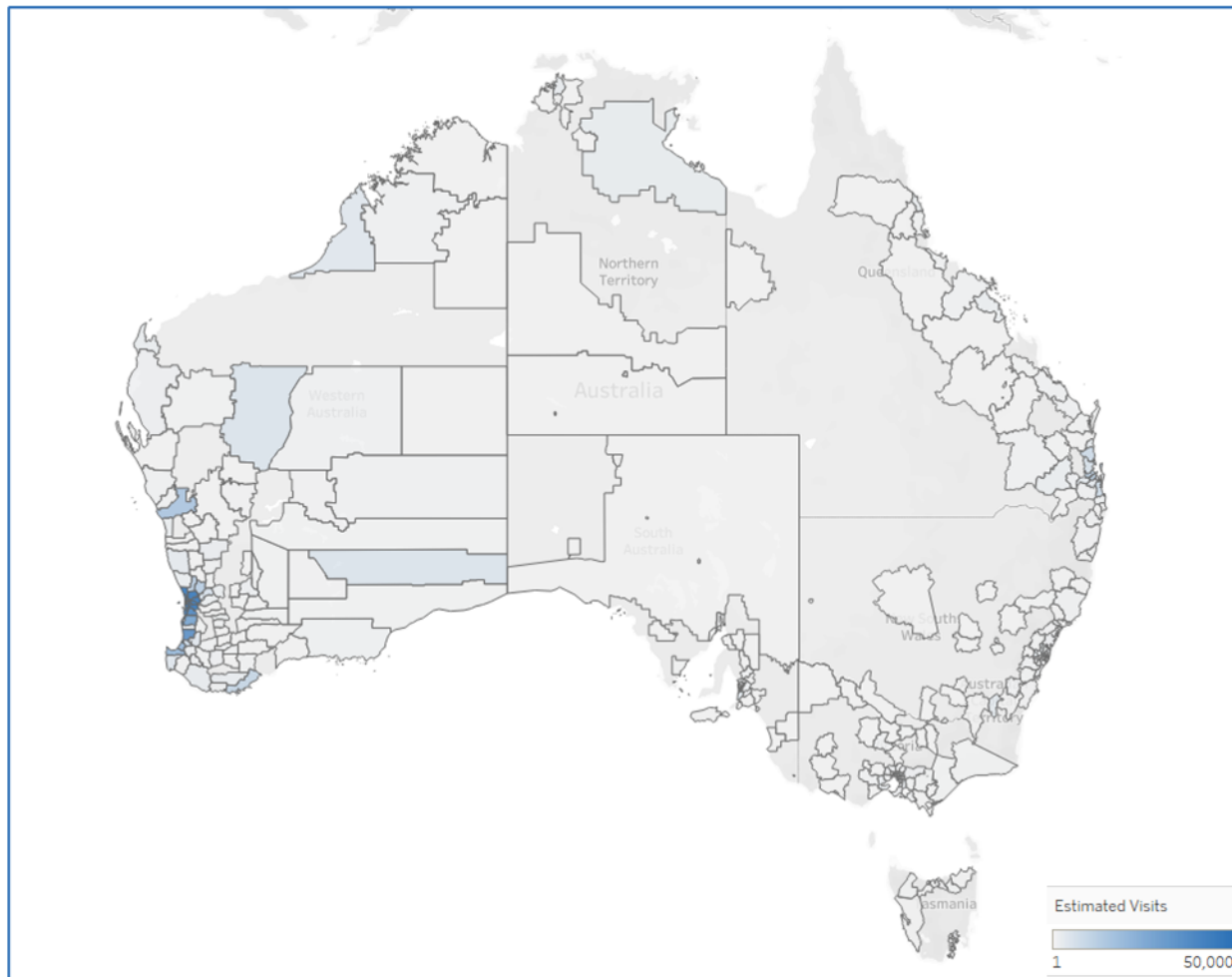
Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis



# Greater Perth residents make up 87% of visitation with the other top visitor markets coming from other WA cities and state capitals

## HEAT MAP OF AU RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by common evening LGA, YE July 2023



Local Government Area (LGA)	Estimated Daily Visits	% of Total
Greater Perth, Western Australia	7,514	87%
Harvey S, Western Australia	106	1%
Bunbury C, Western Australia	100	1%
Greater Sydney, New South Wales	96	1%
Greater Melbourne, Victoria	76	1%
Greater Brisbane, Queensland	73	1%
Busselton C, Western Australia	58	1%
Capel S, Western Australia	57	1%
Greater Adelaide, South Australia	50	1%
Greater Geraldton C, Western Australia	45	1%
Other	463	5%
<b>Total</b>	<b>8,639</b>	<b>100%</b>

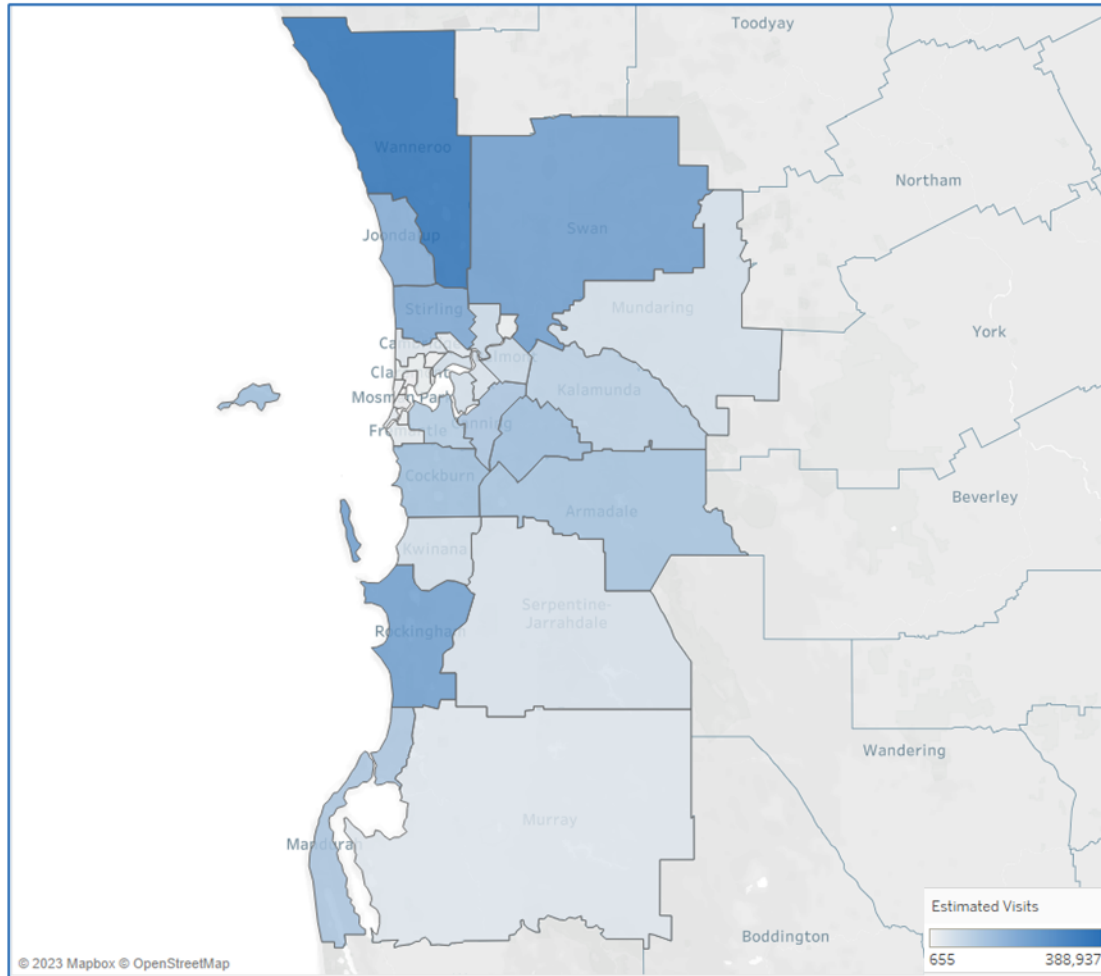
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Within Greater Perth, there are 20 LGAs with over 100 daily visits to The Pilbara, largely coming from northern Perth

## HEAT MAP OF GREATER PERTH RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by common evening LGA, YE July 2023



Greater Perth LGA	Estimated Daily Visits	% of Total
Wanneroo C	1,066	14%
Swan C	668	9%
Rockingham C	652	9%
Stirling C	583	8%
Joondalup C	549	7%
Gosnells C	399	5%
Cockburn C	395	5%
Armadale C	357	5%
Canning C	338	4%
Mandurah C	329	4%
Melville C	285	4%
Kalamunda C	253	3%
Belmont C	181	2%
Bayswater C	180	2%
South Perth C	137	2%
Mundaring S	137	2%
Kwinana C	135	2%
Perth C	135	2%
Victoria Park T	116	2%
Serpentine Jarrahdale S	115	2%
Other	503	7%
<b>Total</b>	<b>7,514</b>	<b>100%</b>

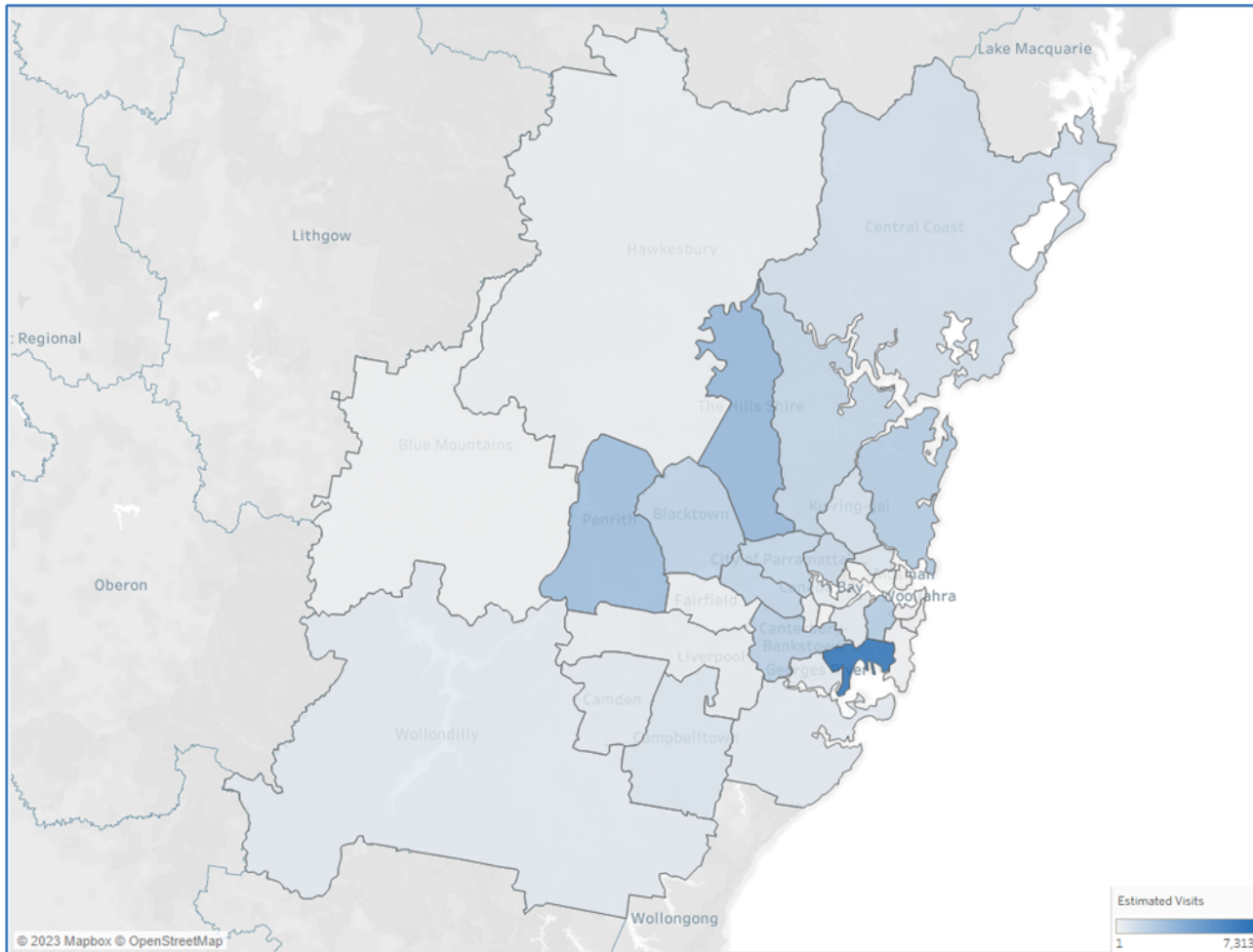
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Greater Sydney residents visits The Pilbara ~100 times daily, the largest visitation outside of Western Australia

## HEAT MAP OF GREATER SYDNEY RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by common evening LGA, YE July 2023



Greater Sydney LGA	Estimated Daily Visits	% of Total
Bayside A	20	21%
Hills Shire A	9	9%
Penrith C	8	8%
Sydney C	5	6%
Northern Beaches A	5	6%
Canterbury Bankstown A	5	5%
Blacktown C	5	5%
Cumberland A	4	4%
Hornsby A	4	4%
Parramatta C	4	4%
Ryde C	4	4%
Central Coast C NSW	3	3%
Ku ring gai A	3	3%
Campbelltown C NSW	2	2%
Willoughby C	2	2%
Inner West A	2	2%
Camden A	1	2%
Georges River A	1	1%
Sutherland Shire A	1	1%
Wollondilly A	1	1%
Other	6	7%
<b>Total</b>	<b>96</b>	<b>100%</b>

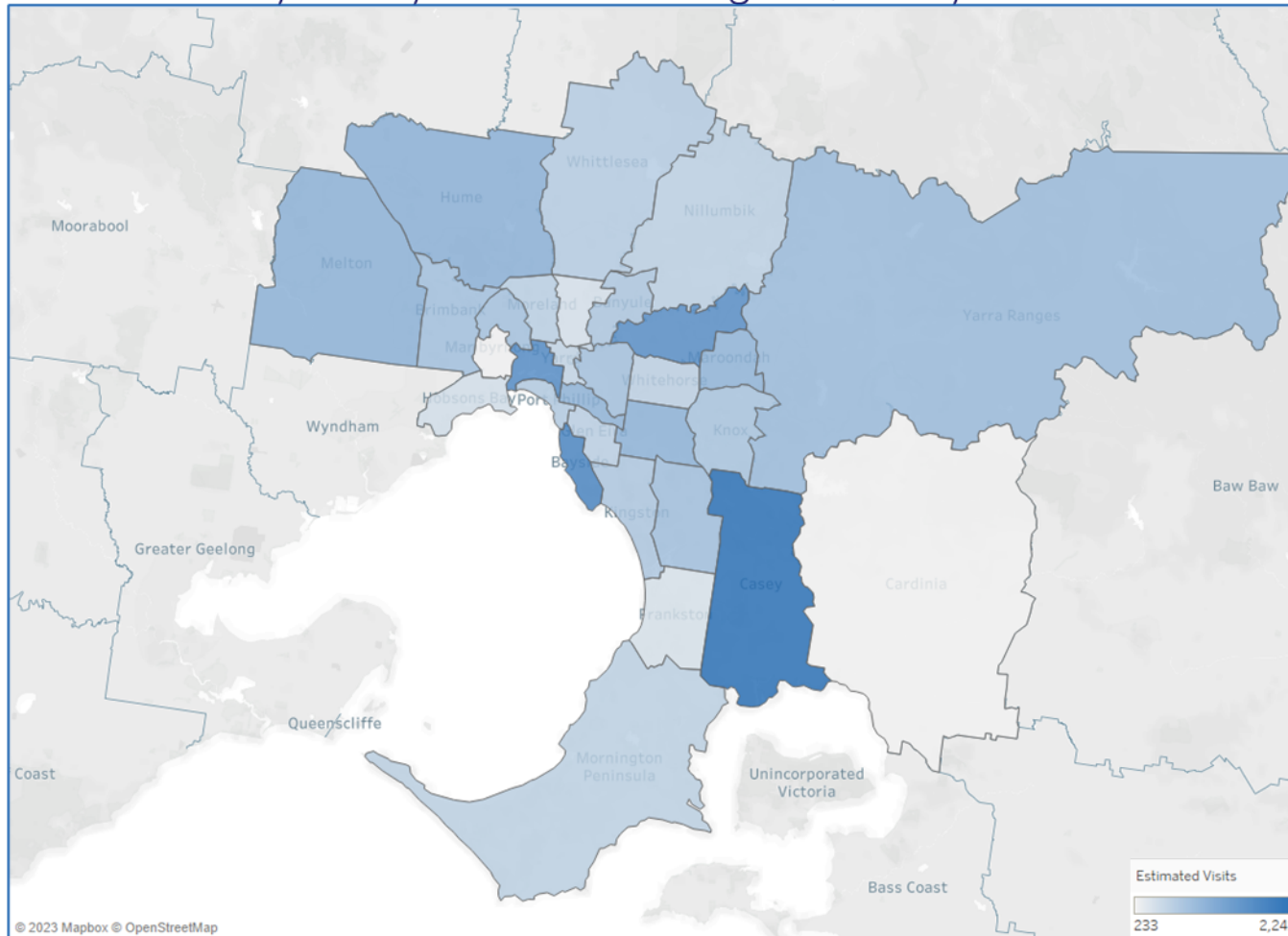
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Greater Melbourne residents visit The Pilbara more than 75 times daily, coming from throughout the region

## HEAT MAP OF GREATER MELBOURNE RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by common evening LGA, YE July 2023



Greater Melbourne LGA	Estimated Daily Visits	% of Total
Casey C	6	8%
Bayside C	5	7%
Melbourne C	5	6%
Manningham C	5	6%
Hume C	3	4%
Melton C	3	4%
Monash C	3	4%
Stonnington C	3	4%
Maroondah C	3	4%
Yarra Ranges S	3	4%
Greater Dandenong C	3	3%
Brimbank C	3	3%
Boroondara C	3	3%
Moonee Valley C	2	3%
Knox C	2	3%
Banyule C	2	3%
Kingston C Vic	2	3%
Port Phillip C	2	3%
Whittlesea C	2	3%
Moreland C	2	3%
Other	14	19%
<b>Total</b>	<b>76</b>	<b>100%</b>

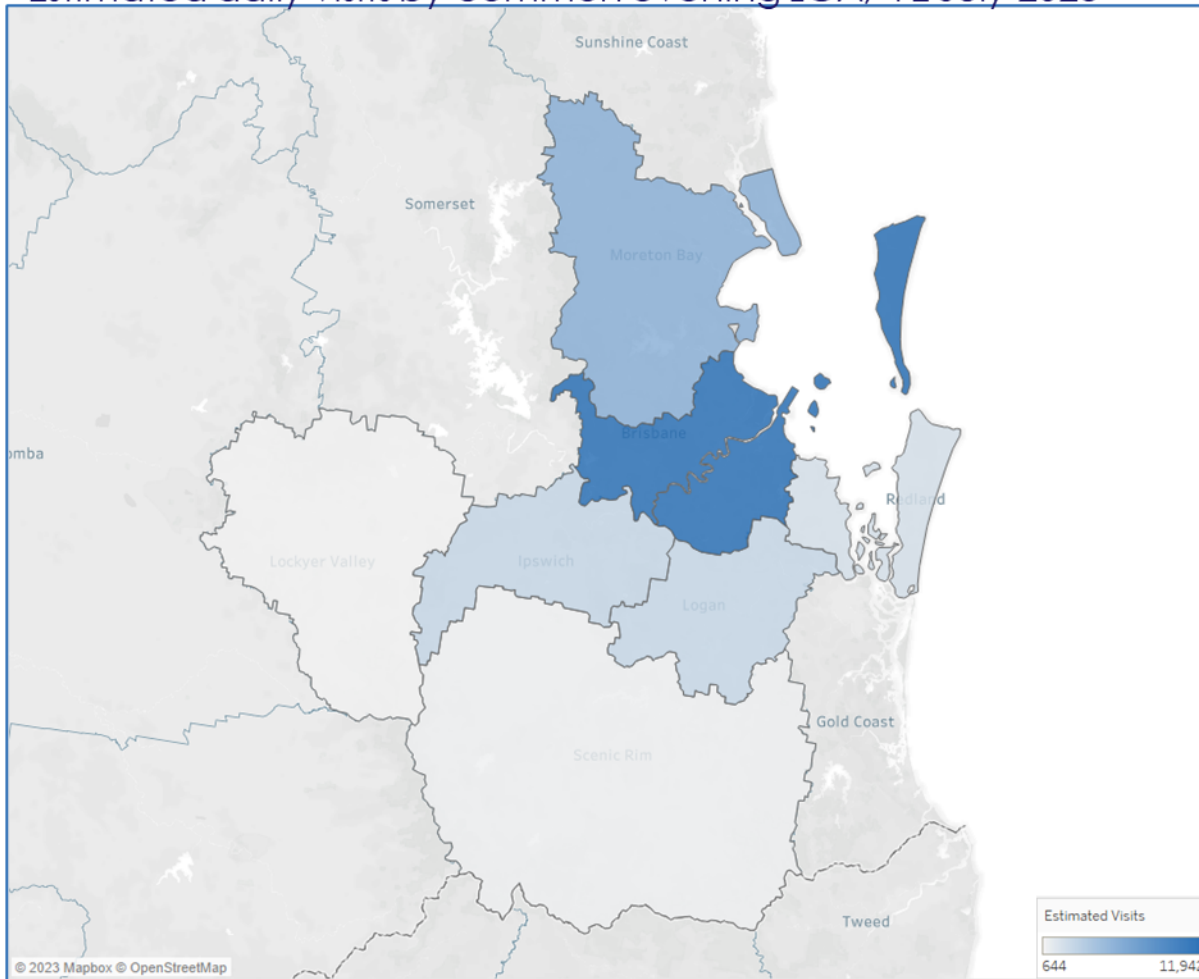
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Brisbane residents also visit The Pilbara ~75 times daily with most coming from the City of Brisbane and Moreton Bay Region

## HEAT MAP OF GREATER BRISBANE RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by common evening LGA, YE July 2023



Greater Brisbane LGA	Estimated Daily Visits	% of Total
Brisbane C	33	45%
Moreton Bay R	16	22%
Ipswich C	7	10%
Logan C	7	10%
Redland C	5	7%
Scenic Rim R	2	3%
Lockyer Valley R	2	2%
<b>Total</b>	<b>73</b>	<b>100%</b>

Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

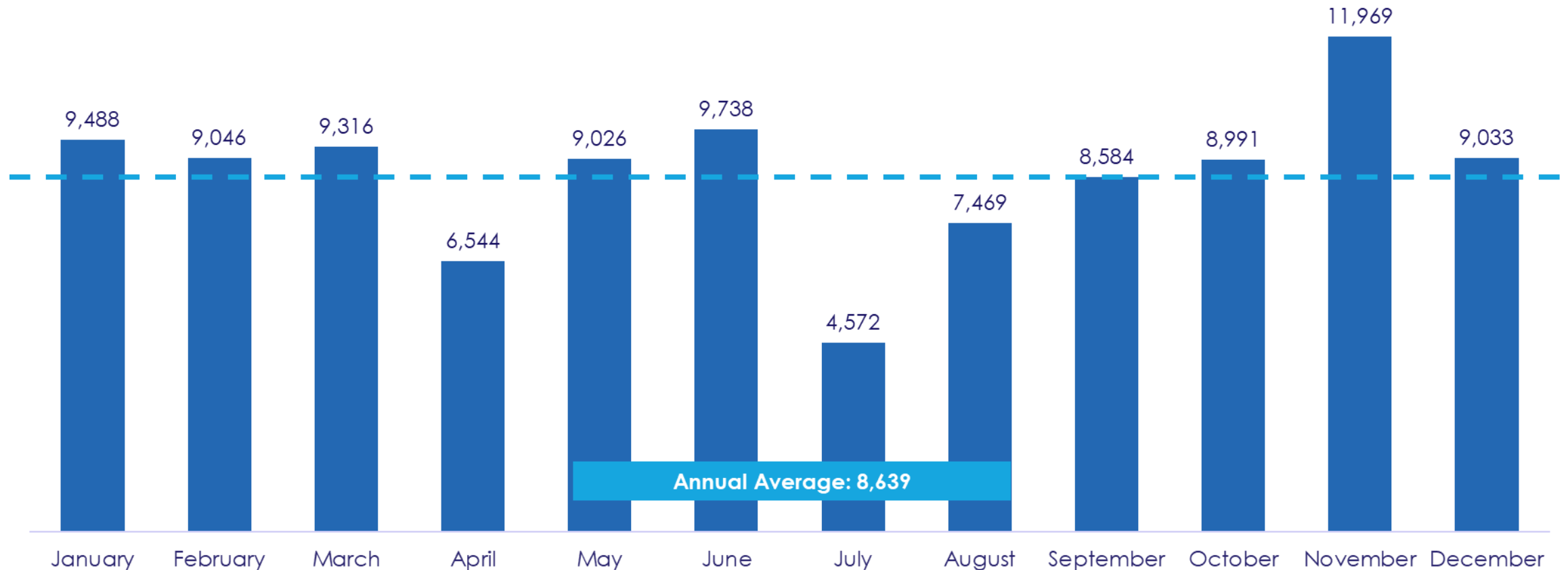
Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis



# Visitation to The Pilbara dips in winter and peaks in spring through summer

## AU RESIDENT DAILY VISITS TO THE PILBARA AIRPORTS

Estimated daily visits by month, YE July 2023



Note: Excludes residents of The Pilbara

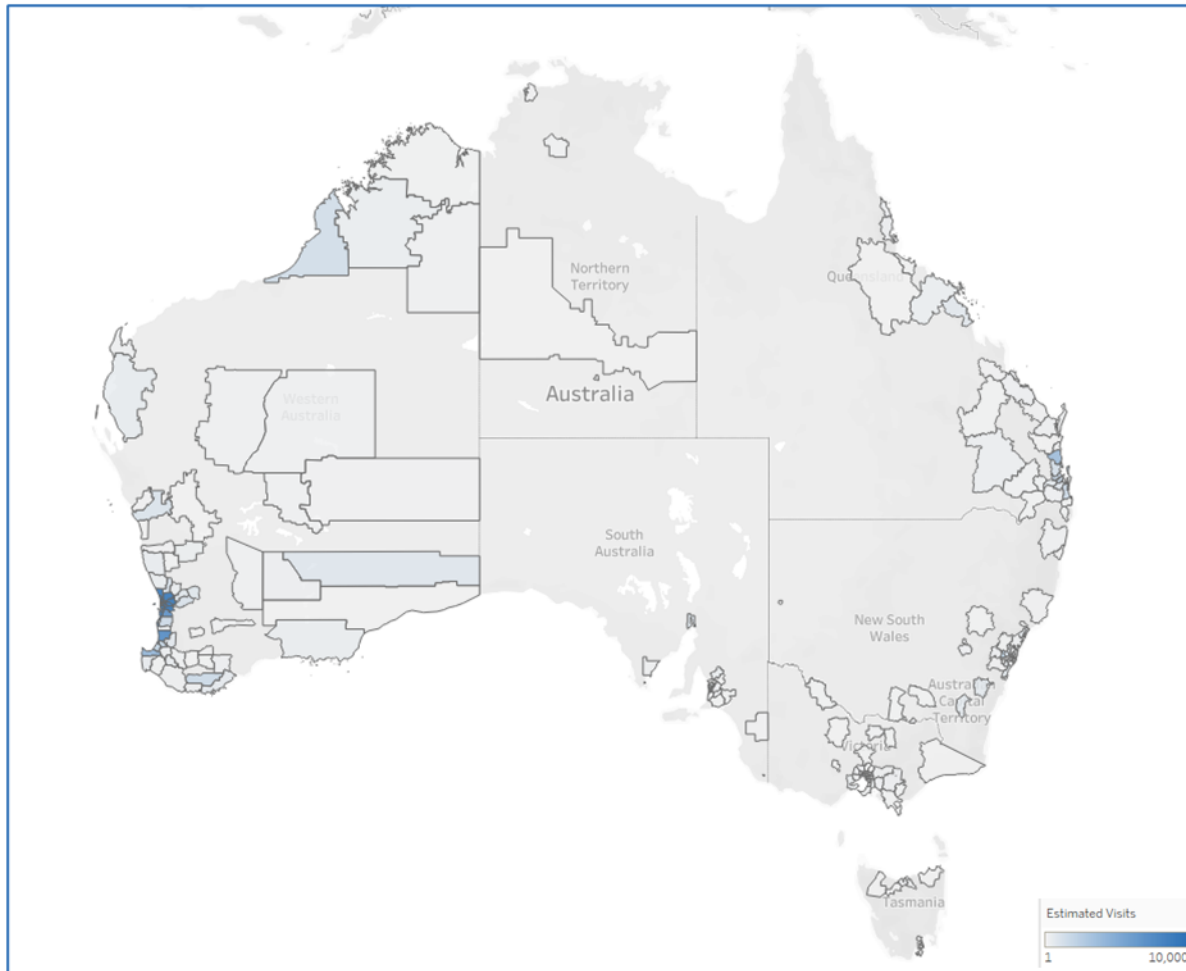
Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# PHE Visitation & Catchment Area

# Greater Perth residents make up 86% of visitation to PHE with the other top visitor markets coming from other WA cities and state capitals

## HEAT MAP OF AU RESIDENT DAILY VISITS TO PHE

Estimated daily visits by common evening LGA, YE July 2023



Local Government Area (LGA)	Estimated Daily Visits	% of Total
Greater Perth, Western Australia	1,290	86%
Harvey S, Western Australia	22	1%
Greater Sydney, New South Wales	20	1%
Greater Melbourne, Victoria	19	1%
Greater Brisbane, Queensland	14	1%
Bunbury C, Western Australia	12	1%
Busselton C, Western Australia	12	1%
Greater Adelaide, South Australia	11	1%
Sunshine Coast R, Queensland	10	1%
Capel S, Western Australia	6	0%
Other	78	5%
<b>TOTAL</b>	<b>1,495</b>	<b>100%</b>

Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

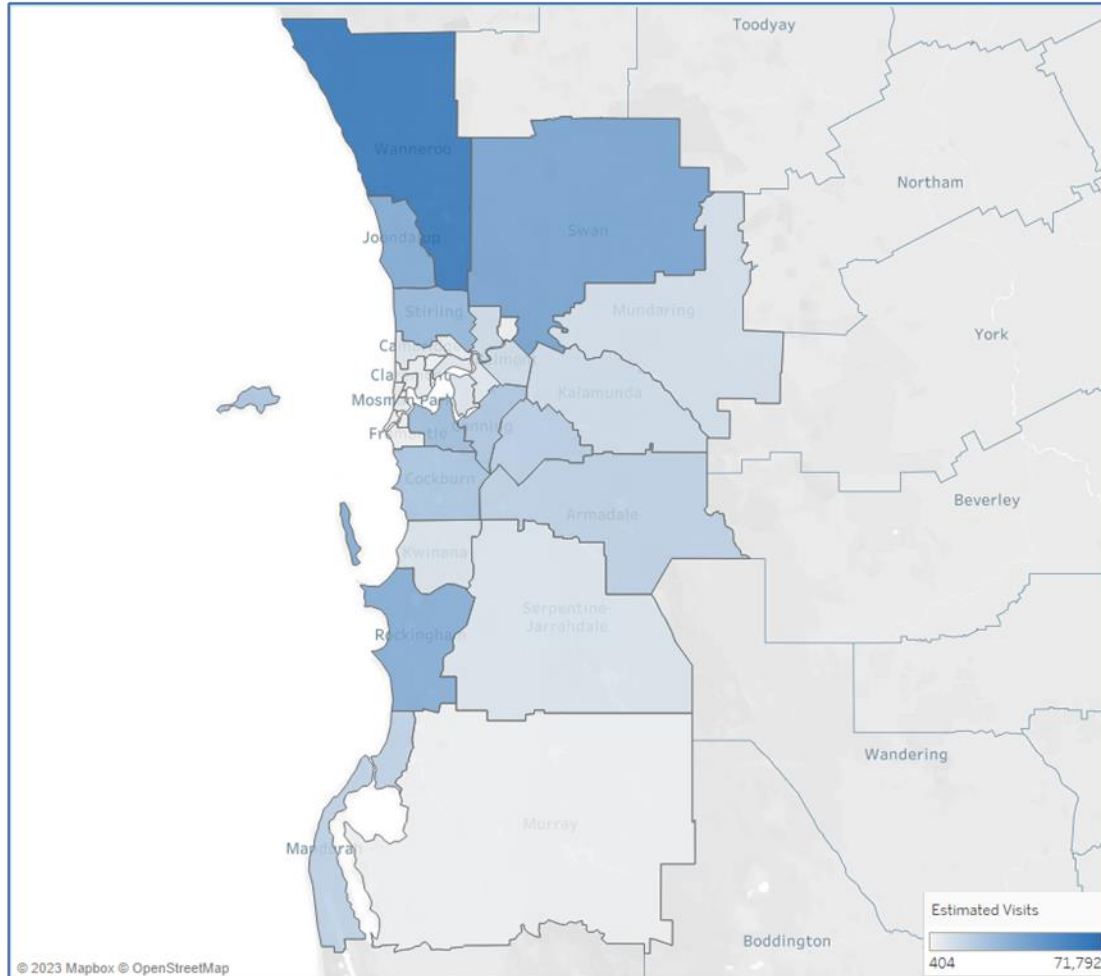
Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis



# Of the ~1,300 visits to PHE from Greater Perth, many come from northern Perth

## HEAT MAP OF GREATER PERTH RESIDENT DAILY VISITS TO PHE

Estimated daily visits by common evening LGA, YE July 2023



Greater Perth LGA	Estimated Daily Visits	% of Total
Wanneroo C	197	15%
Swan C	121	9%
Joondalup C	110	9%
Rockingham C	104	8%
Stirling C	87	7%
Melville C	78	6%
Cockburn C	66	5%
Canning C	64	5%
Gosnells C	51	4%
Armadale C	49	4%
Mandurah C	48	4%
Bayswater C	34	3%
Belmont C	33	3%
Kalamunda C	32	2%
Mundaring S	29	2%
Kwinana C	22	2%
Serpentine Jarrahdale S	20	2%
South Perth C	19	1%
Cambridge T	18	1%
Perth C	18	1%
Other	91	7%
<b>Total</b>	<b>1,290</b>	<b>100%</b>

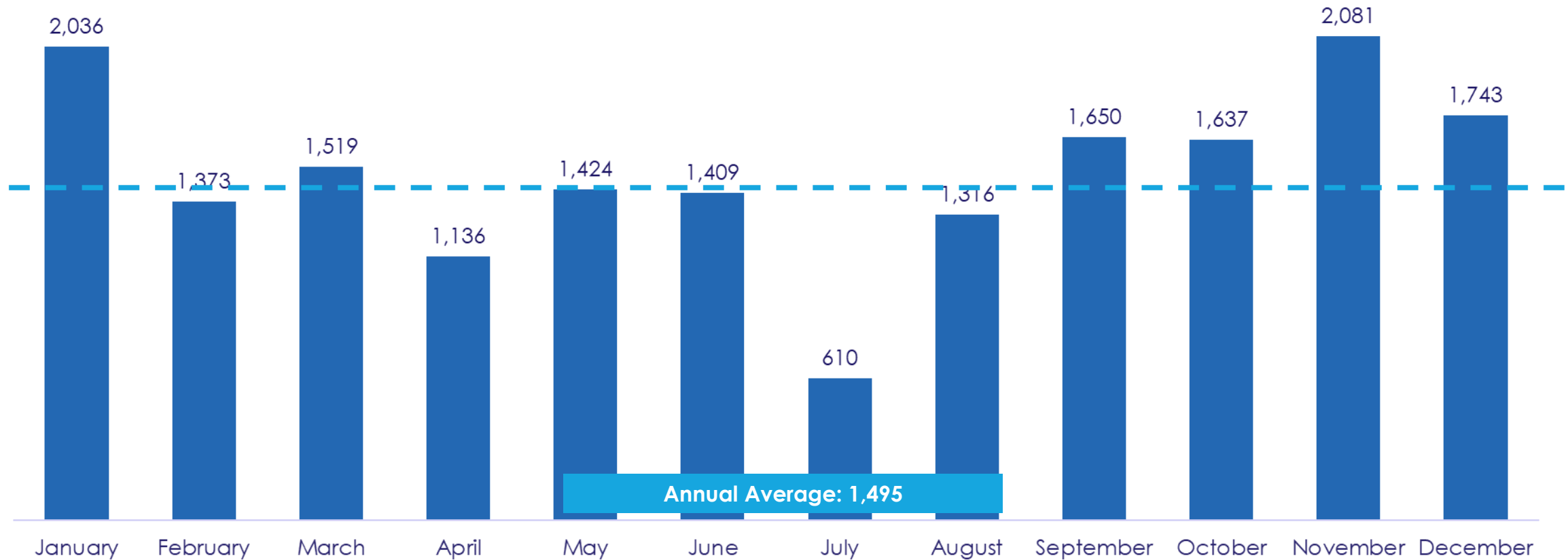
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Visits to PHE are strongest in the spring and early summer

## AU RESIDENT DAILY VISITS TO PHE

Estimated daily visits by month, YE July 2023



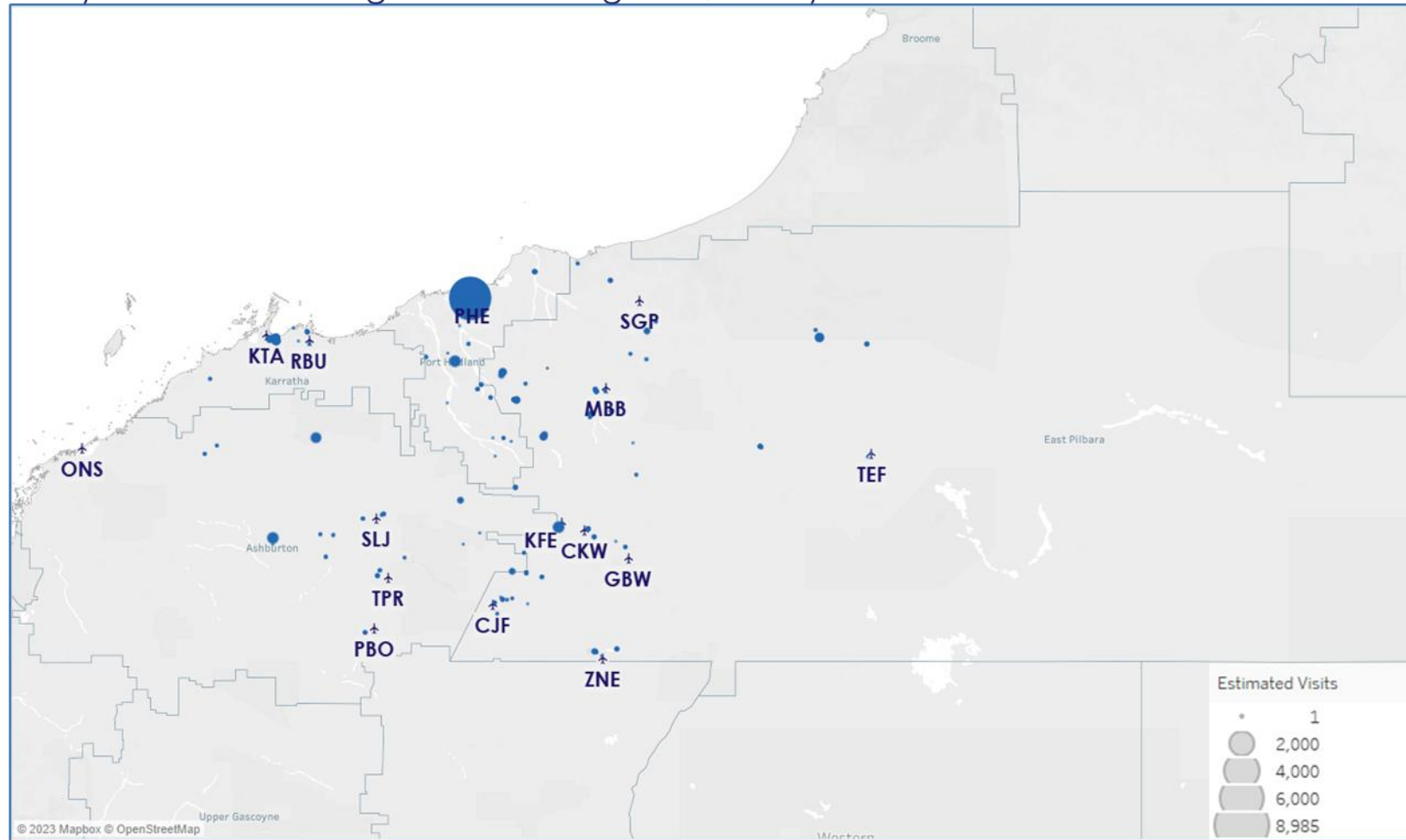
Note: Excludes residents of The Pilbara

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# PHE's outbound catchment area is largely in Port Hedland and surrounding areas

## HEAT MAP OF THE PILBARA RESIDENT DAILY VISITS TO PHE (OUTBOUND CATCHMENT AREA)

Estimated daily visits by common evening latitude & longitude, YE July 2023



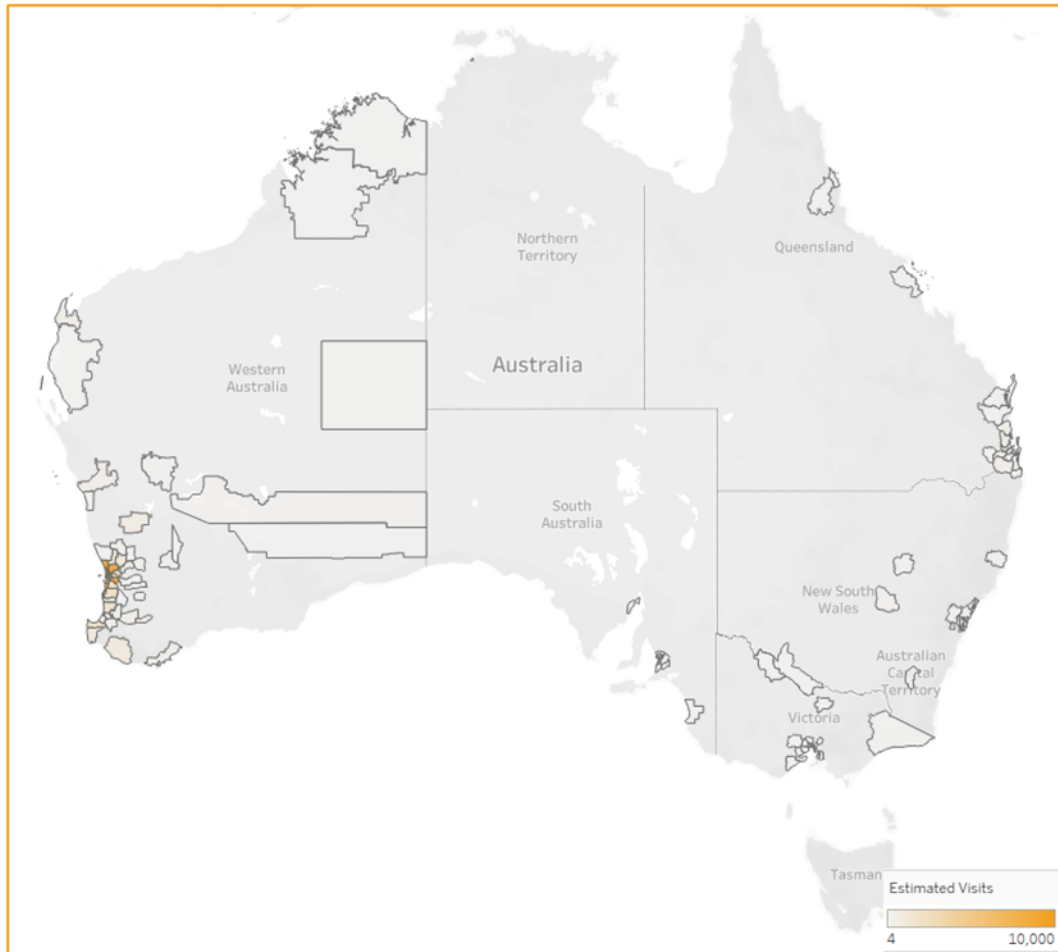
Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# PBO Visitation & Catchment Area

# 90% of PBO visitation comes from Greater Perth with only a handful of daily visits from other markets

## HEAT MAP OF AU RESIDENT DAILY VISITS TO PBO

Estimated daily visits by common evening LGA, YE July 2023



Local Government Area (LGA)	Estimated Daily Visits	% of Total
Greater Perth, Western Australia	654	90%
Greater Adelaide, South Australia	8	1%
Greater Sydney, New South Wales	7	1%
Greater Melbourne, Victoria	6	1%
Greater Brisbane, Queensland	6	1%
Busselton C, Western Australia	6	1%
Harvey S, Western Australia	5	1%
Chittering S, Western Australia	3	0%
Toodyay S, Western Australia	3	0%
Augusta Margaret River S, Western Australia	3	0%
Other	26	4%
<b>TOTAL</b>	<b>726</b>	<b>100%</b>

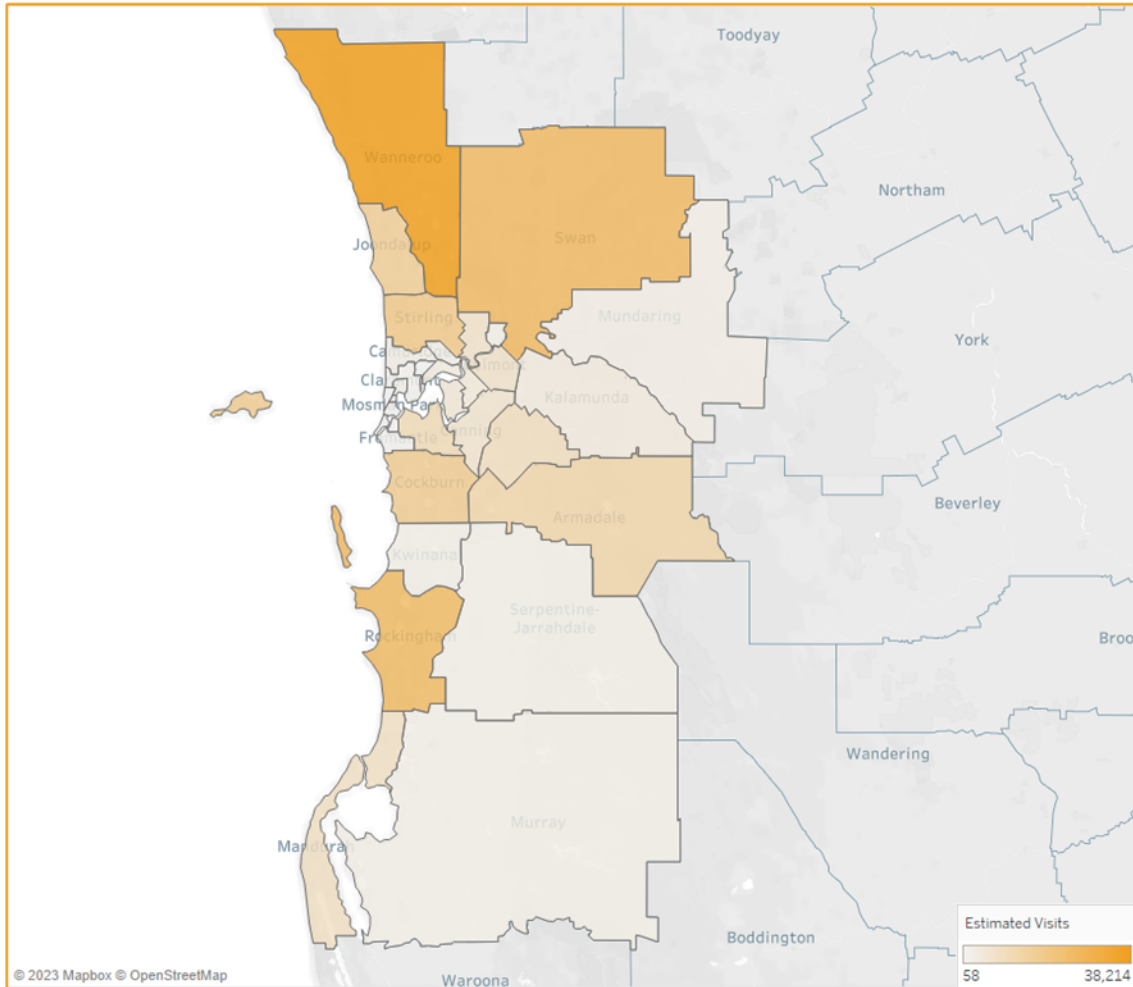
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Visits to PBO are largely coming from northern Perth

## HEAT MAP OF GREATER PERTH RESIDENT DAILY VISITS TO PBO

Estimated daily visits by common evening LGA, YE July 2023



Greater Perth LGA	Estimated Daily Visits	% of Total
Wanneroo C	105	16%
Swan C	71	11%
Rockingham C	69	11%
Stirling C	51	8%
Cockburn C	46	7%
Joondalup C	44	7%
Armadale C	35	5%
Melville C	28	4%
Gosnells C	25	4%
Mandurah C	22	3%
Belmont C	20	3%
Bayswater C	20	3%
Canning C	17	3%
South Perth C	13	2%
Victoria Park T	12	2%
Kalamunda C	10	2%
Perth C	9	1%
Cambridge T	6	1%
Mundaring S	6	1%
Vincent C	6	1%
Other	38	6%
<b>Total</b>	<b>654</b>	<b>100%</b>

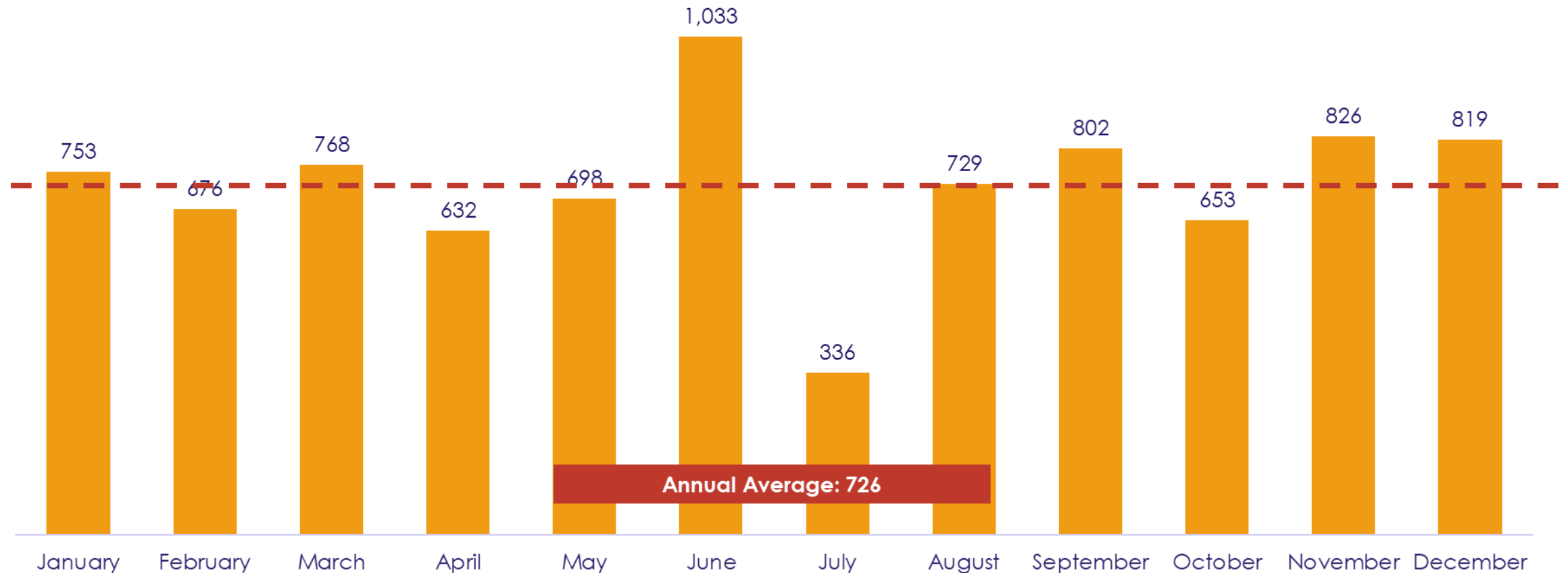
Note: Excludes residents of The Pilbara; State/Territory capital definitions are Greater Capital City Statistical Areas, all else are Local Government Areas

Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis

# Visits to PBO are strongest in late spring, early winter and June

## AU RESIDENT DAILY VISITS TO PBO

Estimated daily visits by month, YE July 2023



Note: Excludes residents of The Pilbara

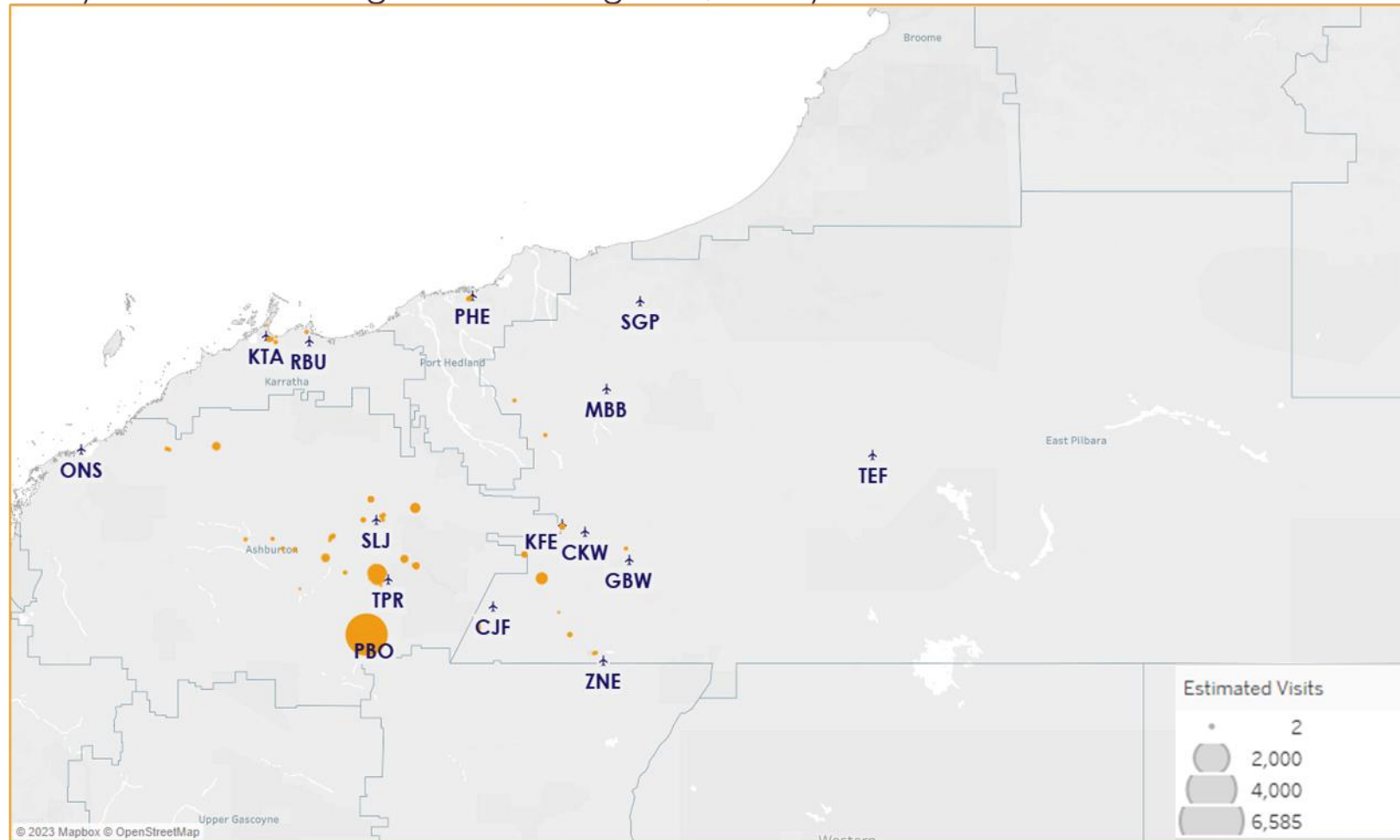
Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis



# The catchment area for PBO is in and surrounding Paraburdoo and extending north towards Tom Price

## HEAT MAP OF THE PILBARA RESIDENT DAILY VISITS TO PBO (OUTBOUND CATCHMENT AREA)

Estimated daily visits by common evening latitude & longitude, YE July 2023



Source: Mobile location tracking data via Near; Ailevon Pacific Aviation Consulting analysis



# Deep experience & global coverage has helped our clients achieve outstanding success

*Ailevon Pacific Aviation Consulting is an international firm specializing in Air Service Development. We provide advice to Boards, CEOs, Business Development Managers, and other senior executives to help them define aviation strategy, identify new markets, advance business opportunities, and develop their organizations.*

*Clear insights, Soaring results*