

# GERMANY | MARKET PROFILE 2025

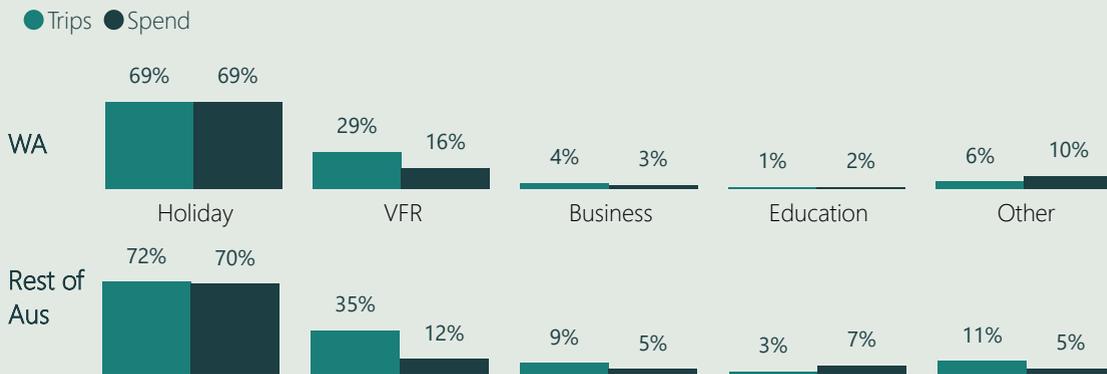
## MARKET OVERVIEW

### Leisure Visitation to WA (as compared to an average for other states/territories) <sup>1</sup>

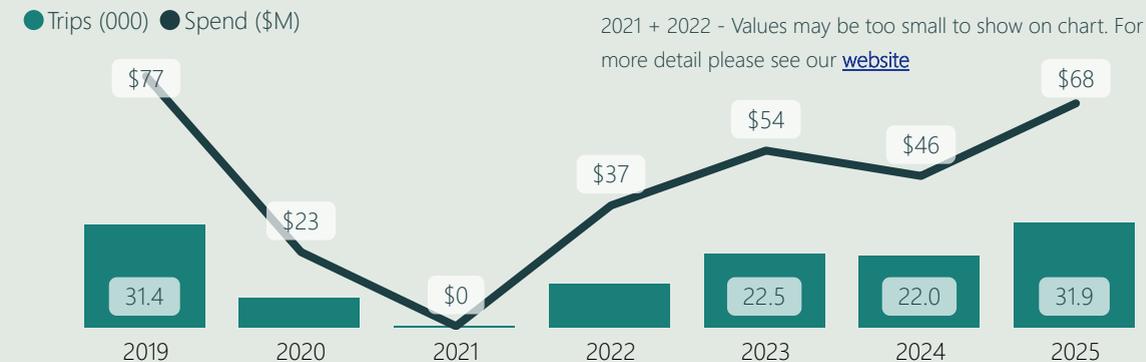
Rest of Aus is an average of all other states excluding WA



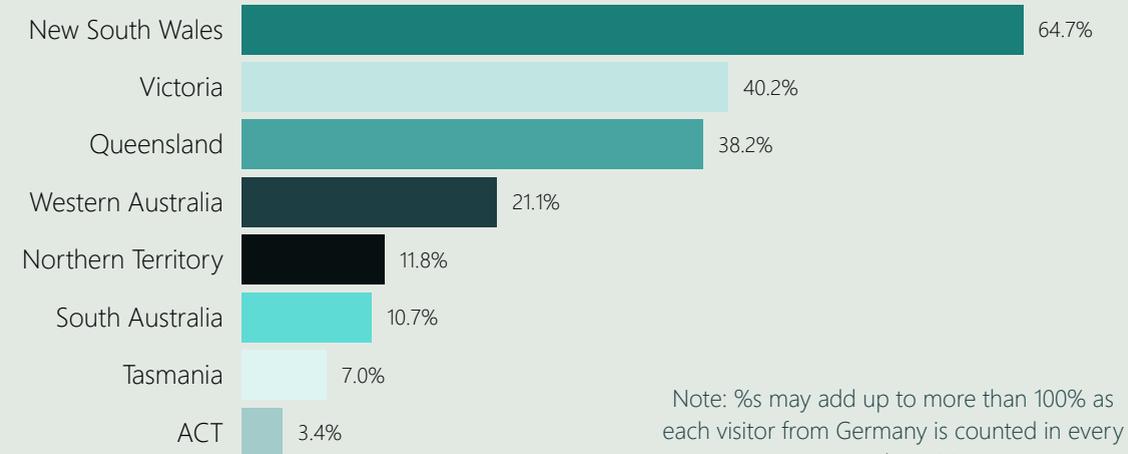
### Total Trips and Spend by Purpose <sup>1</sup>



### Leisure Visitation and Spend in WA <sup>2</sup>

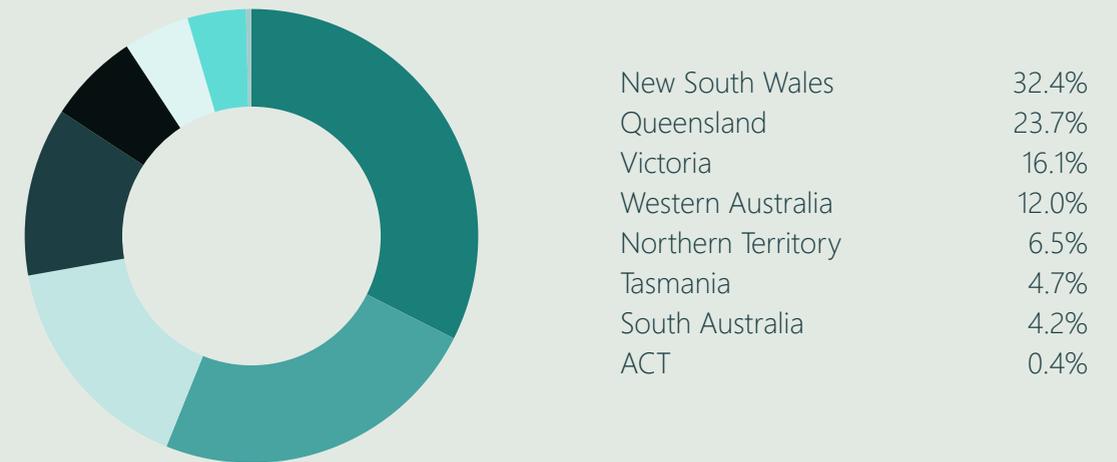


### Market Share of Leisure Trips to Australia <sup>1</sup>



Note: %s may add up to more than 100% as each visitor from Germany is counted in every state they visit.

### Market Share of Leisure Trip Spend in Australia <sup>1</sup>



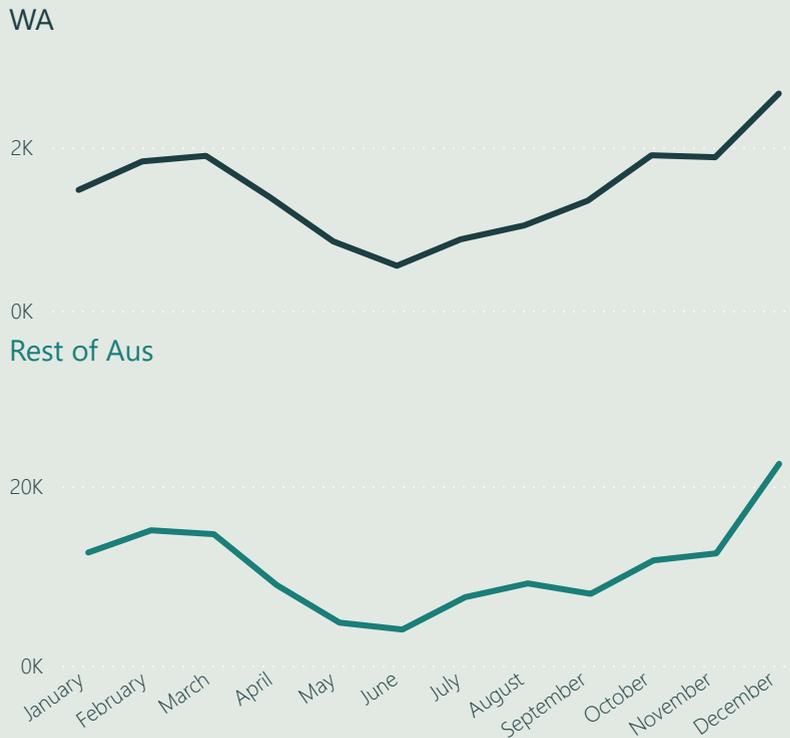
Explanatory note: 12.0% of all German leisure trip spend in Australia was spent in WA.

● WA ● NSW ● VIC ● QLD ● SA ● TAS ● NT ● ACT

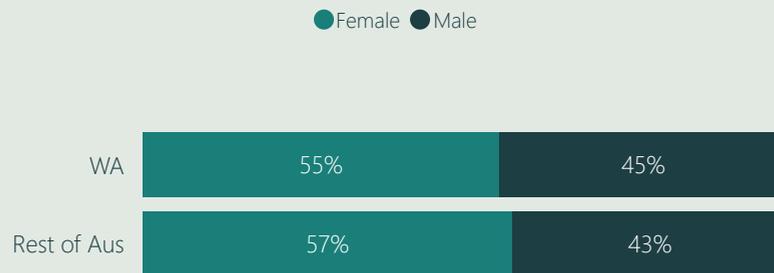
# GERMANY | MARKET PROFILE

## LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

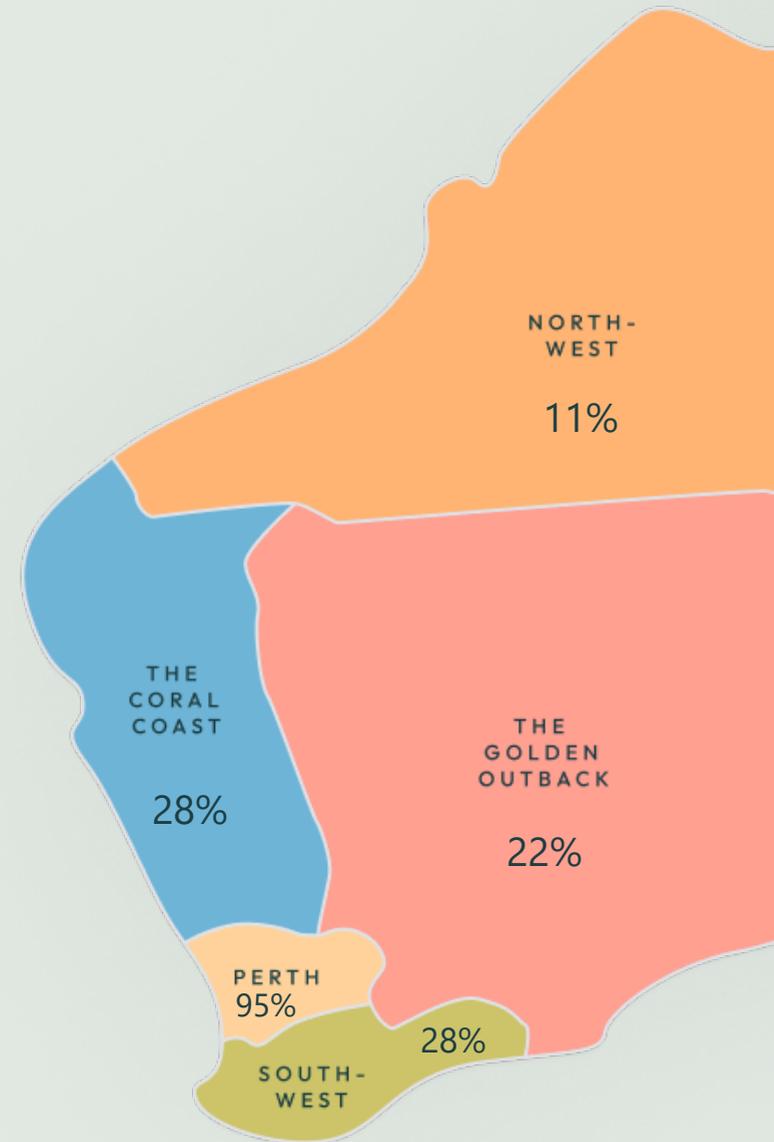
### Seasonality - Short-term Leisure Visitor Arrivals <sup>4</sup>



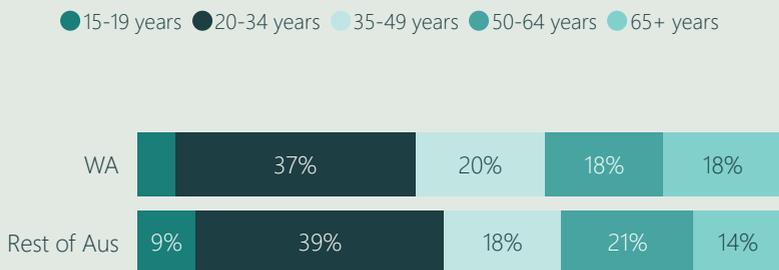
### Gender <sup>3</sup>



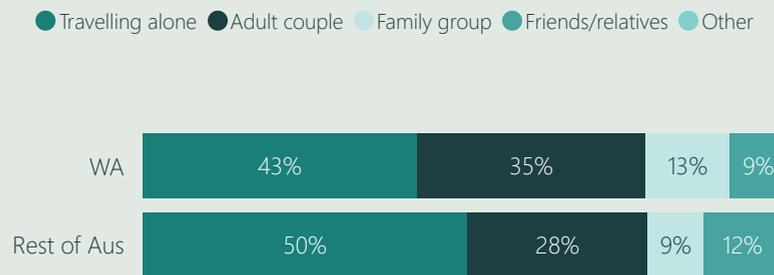
### Regional Dispersal <sup>3</sup>



### Age <sup>3</sup>



### Travel Party <sup>3</sup>



### Average Length of Stay in State <sup>3</sup>



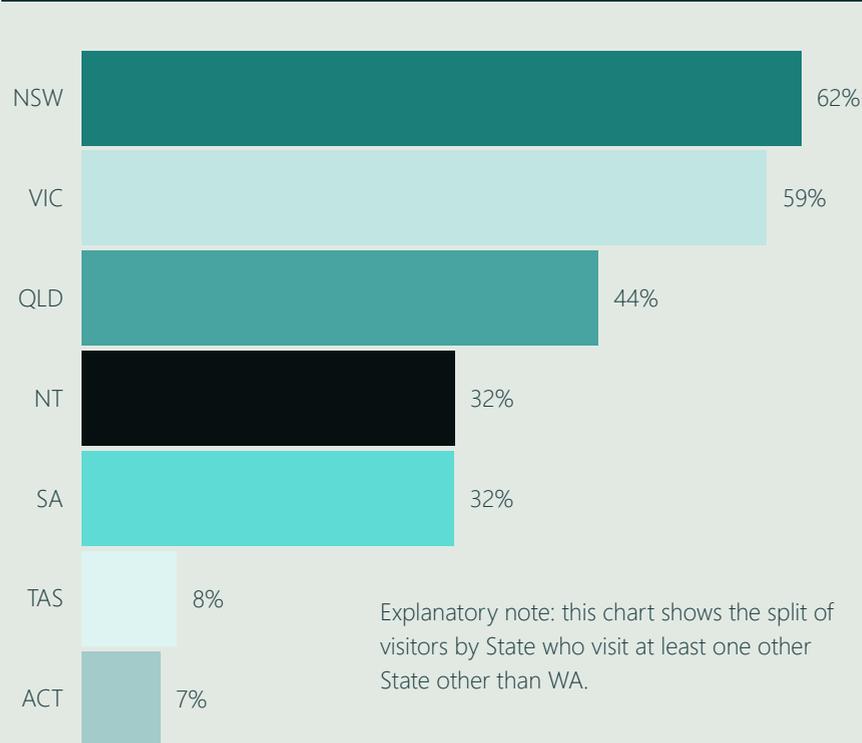
# GERMANY | MARKET PROFILE

## LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

### Top 10 Activities for Leisure Visitors to WA <sup>3</sup>\*

	WA	Rest of Aus
	%	%
① Eat out / dine at a restaurant and/or cafe	98%	96%
② Go to the beach	93%	86%
③ Sightseeing/looking around	93%	92%
④ Visit national parks / state parks	92%	73%
⑤ Go shopping for pleasure	76%	79%
⑥ Visit botanical or other public gardens	75%	72%
⑦ Go to markets	71%	60%
⑧ Bushwalking / rainforest walks	66%	55%
⑨ Pubs, clubs, discos etc	61%	56%
⑩ Charter boat / cruise / ferry	54%	39%

### Other States Visited <sup>3</sup>



### Group Tour v Free Independent Travellers (FIT) <sup>3</sup>

89% of German leisure visitors to WA are free independent travellers. 93% of German leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

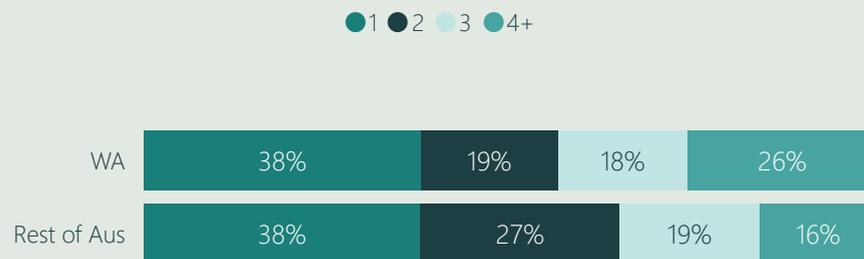
### Repeat Visitors <sup>3</sup>

45% of German leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 43%.

### Top 3 Accommodation Choices for Leisure Visitors to WA <sup>3</sup>

	WA	Rest of Aus
	%	%
① Other commercial accommodation	54%	43%
② Hotel/resort/motel or motor Inn	46%	59%
③ Caravan or camping	34%	18%

### Number of States Visited <sup>3</sup>



### Travel Packages <sup>3</sup>

9% of German leisure visitors to WA arrived on a travel package and the percentage this type of visitor makes up in the rest of Australia is 7%.

\*Note: Activity may have taken in place in WA or elsewhere in Australia during the trip.

# GERMANY | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

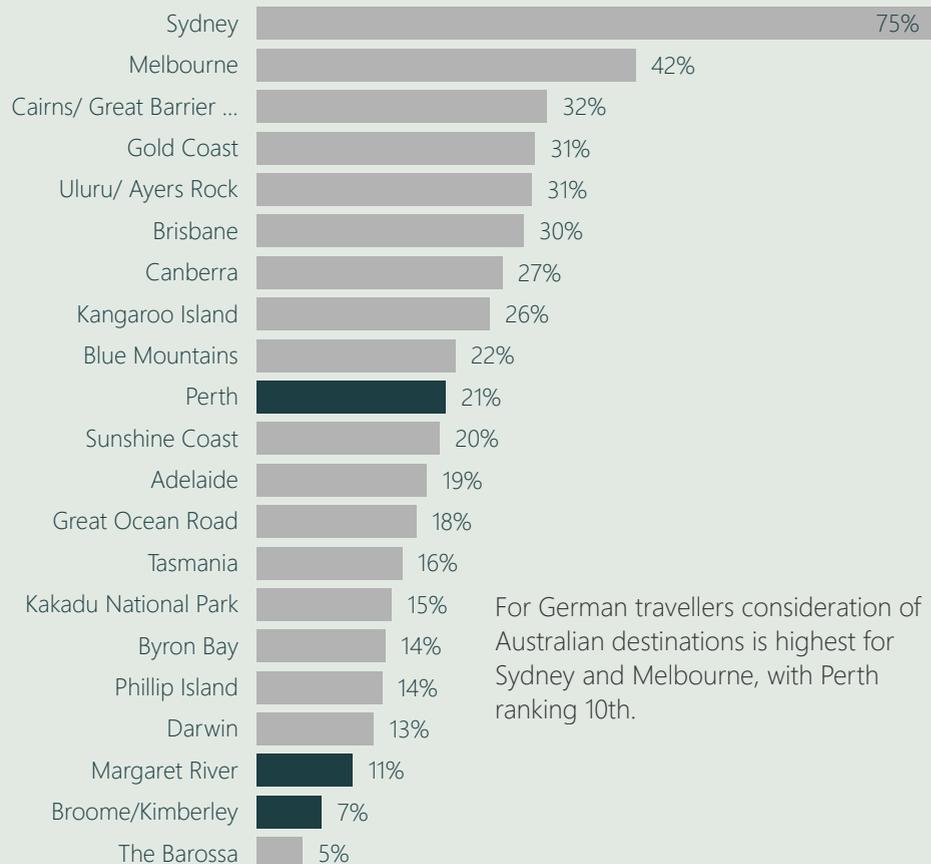
### Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

### Consideration of Australian Destinations <sup>5</sup>

(those considering a trip to Australia in the next 4 years)



For German travellers consideration of Australian destinations is highest for Sydney and Melbourne, with Perth ranking 10th.

### Which factors are most important when choosing a destination <sup>5</sup>

- ① Appealing climate or weather
- ② A safe and secure destination
- ③ Easy to get to (time & effort)
- ④ Good accommodation options
- ⑤ Value for money
- ⑥ World class beaches & coastlines

Appealing climate/weather is the number one driver of destination choice for German travellers, and they place more emphasis on this than the average traveller. They also seek destinations that are safe, easy to get to (time & effort) and offer a good range of accommodation options.

### What OOR travellers associate with destinations <sup>5</sup>

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	37%	22%	16%	15%	8%	7%
A vibrant city lifestyle	61%	45%	26%	25%	4%	5%
Beautiful natural environments	18%	12%	10%	10%	15%	11%
Different and interesting local wildlife	14%	9%	8%	7%	9%	8%
Good food, wine/beverages, local cuisine and produce	44%	32%	21%	19%	9%	9%
Interesting events and festivals	47%	30%	16%	15%	5%	4%
Value for money	19%	14%	12%	12%	6%	6%

German travellers have strong associations for Sydney. Perth's strongest association is a vibrant city lifestyle, while Margaret River performs well for beautiful natural environments.

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## DEFINITIONS & SOURCES

### Definitions

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**Leisure:** comprises both holiday visitors and those visiting friends and relatives (VFR).

### Sources

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1. Tourism Research Australia – International Visitor Survey, YE Dec 25
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24/25
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 24/25
4. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 25
5. Tourism Australia – Consumer Demand Project, October - December 2025.

Published by Tourism WA, April 2026

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