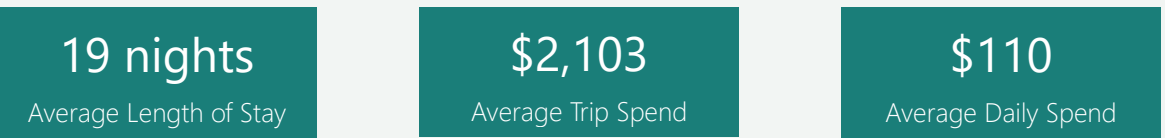


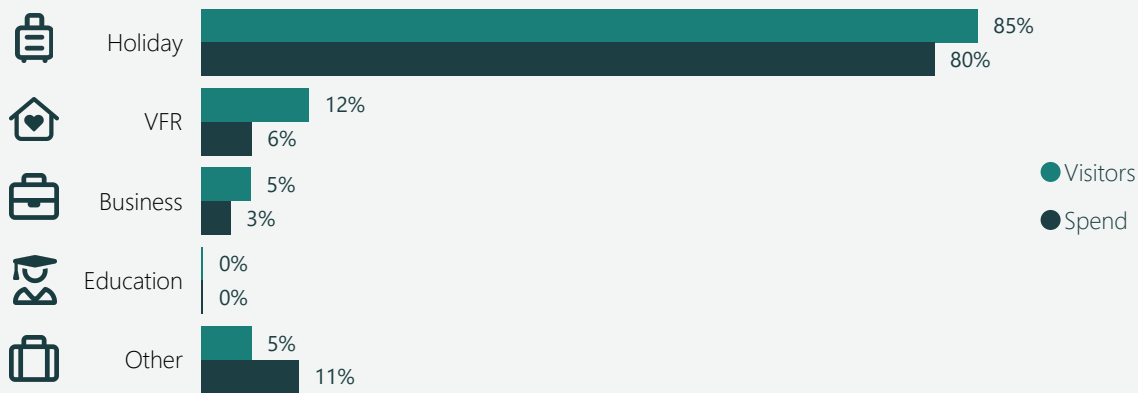
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MARKET OVERVIEW

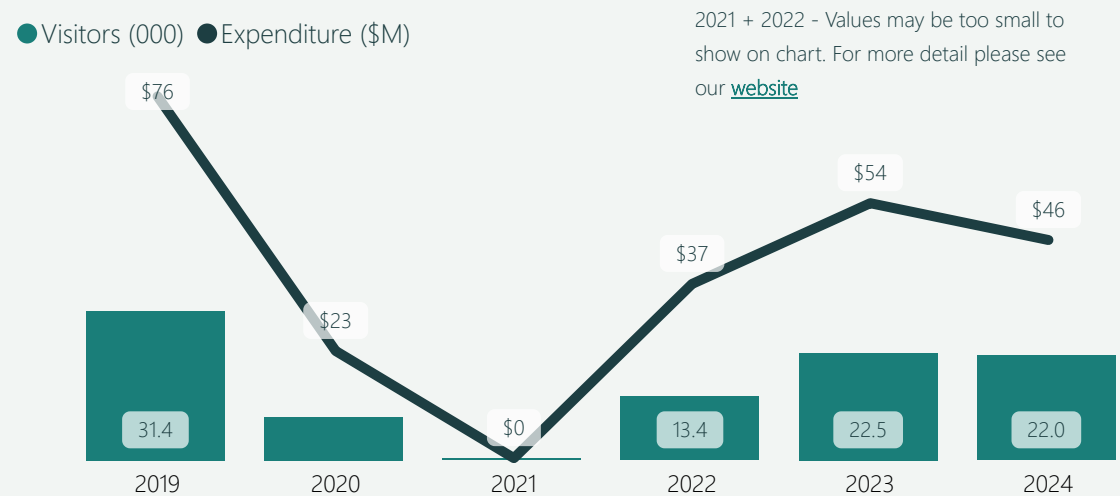
Leisure Visitation to WA ¹



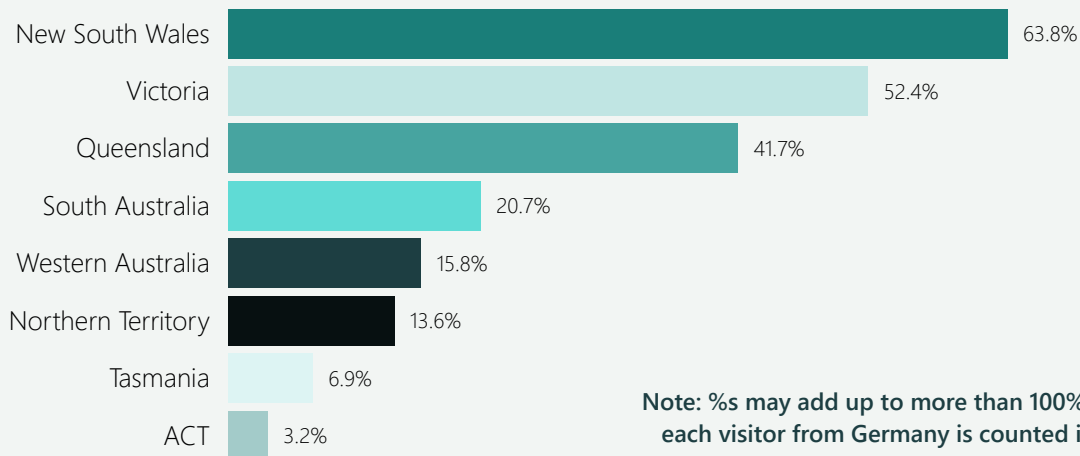
International Visitors and Spend by Purpose (WA) ¹



Leisure Visitation and Spend to WA ²

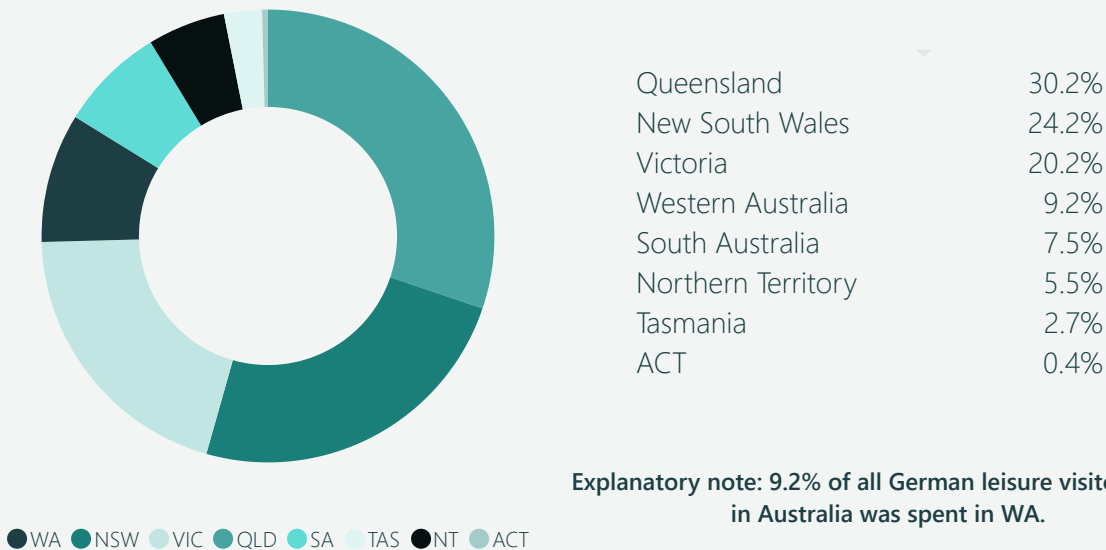


Market Share of International Leisure Visitors to Australia ¹



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

Market Share of International Leisure Visitor Spend in Australia ¹

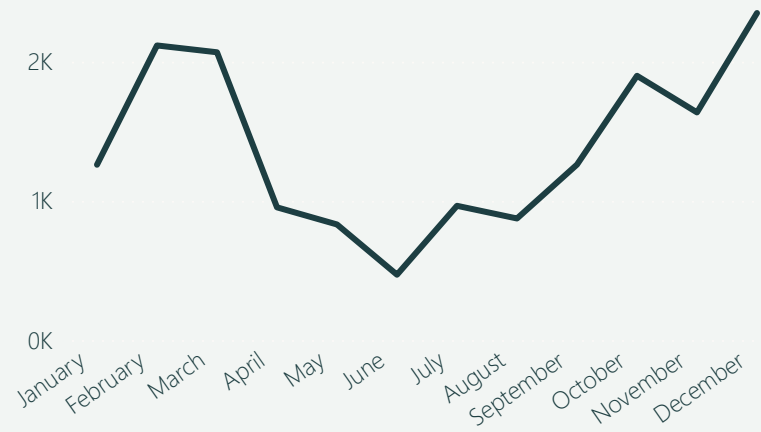


Explanatory note: 9.2% of all German leisure visitor spend in Australia was spent in WA.

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TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

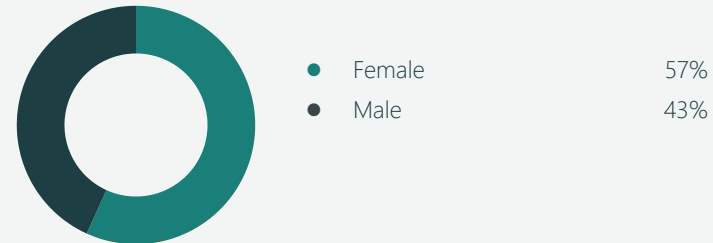
Seasonality - Short-term Leisure Visitor Arrivals to WA ⁴



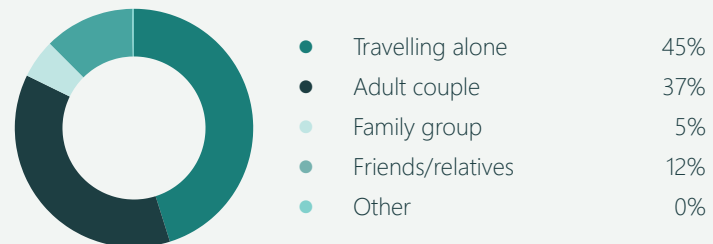
Age ³



Gender ³



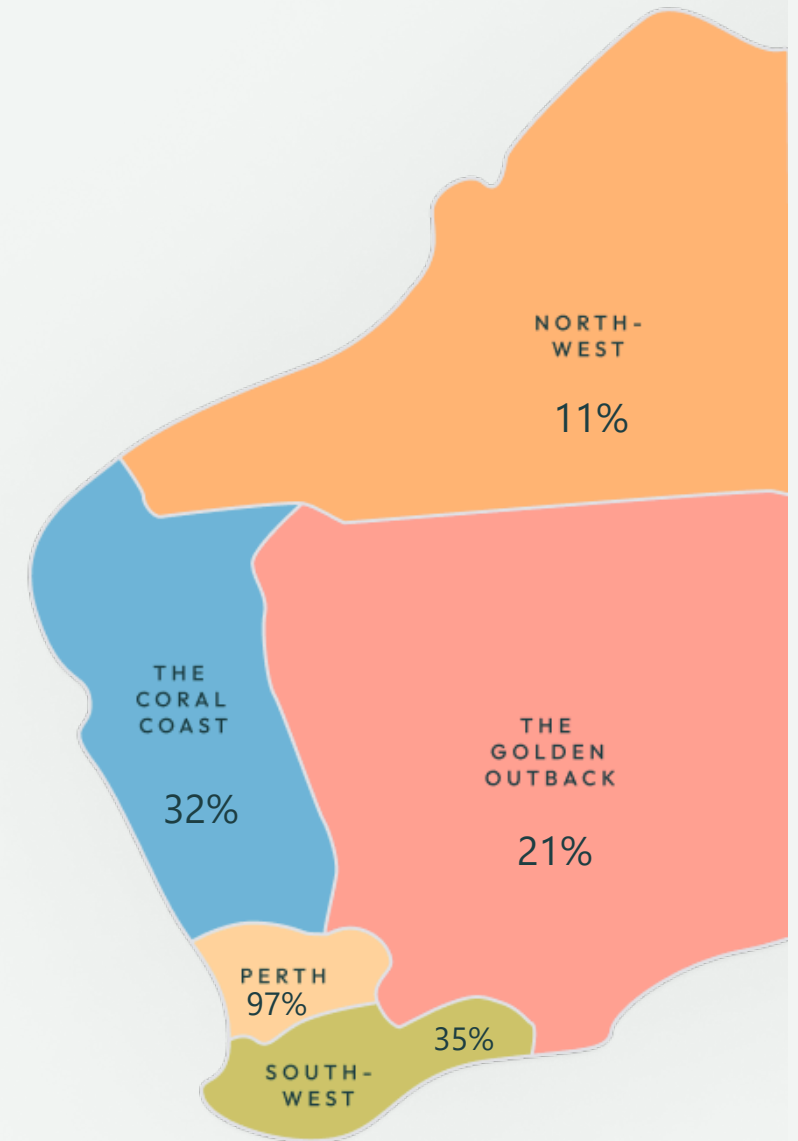
Travel Party ³



Length of Trip ³



Regional Dispersal ³



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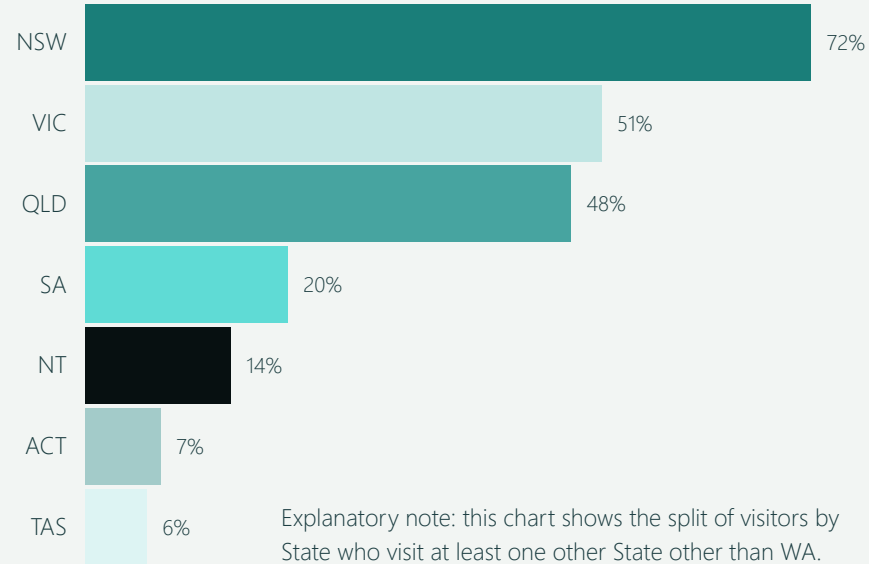
TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

Top 5 Activities for Leisure Visitors to WA ³

①	Eat out / dine at a restaurant and/or cafe	97%
②	Go to the beach	92%
③	Sightseeing/looking around	92%
④	Visit national parks / state parks	85%
⑤	Go shopping for pleasure	80%

NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.

Other States Visited ³



Group Tour v Free Independent Travellers (FIT) ³

97% of German leisure visitors to WA are free independent travellers. 95% 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.

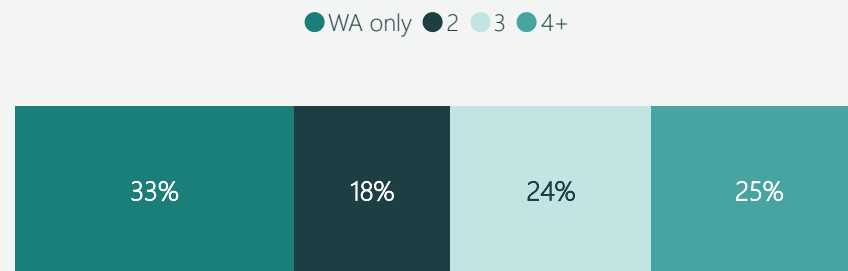
Repeat Visitors ³

51% of German leisure visitors to WA are on a return visit to Australia

Top 3 Accommodation Choices for Leisure Visitors to WA ³

①	Hotel/resort/motel or motor Inn	51%
②	Other commercial accommodation	47%
③	Caravan or camping	28%

Number of States Visited ³



Travel Packages ³

16% of German leisure visitors to WA arrived on a travel package

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IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

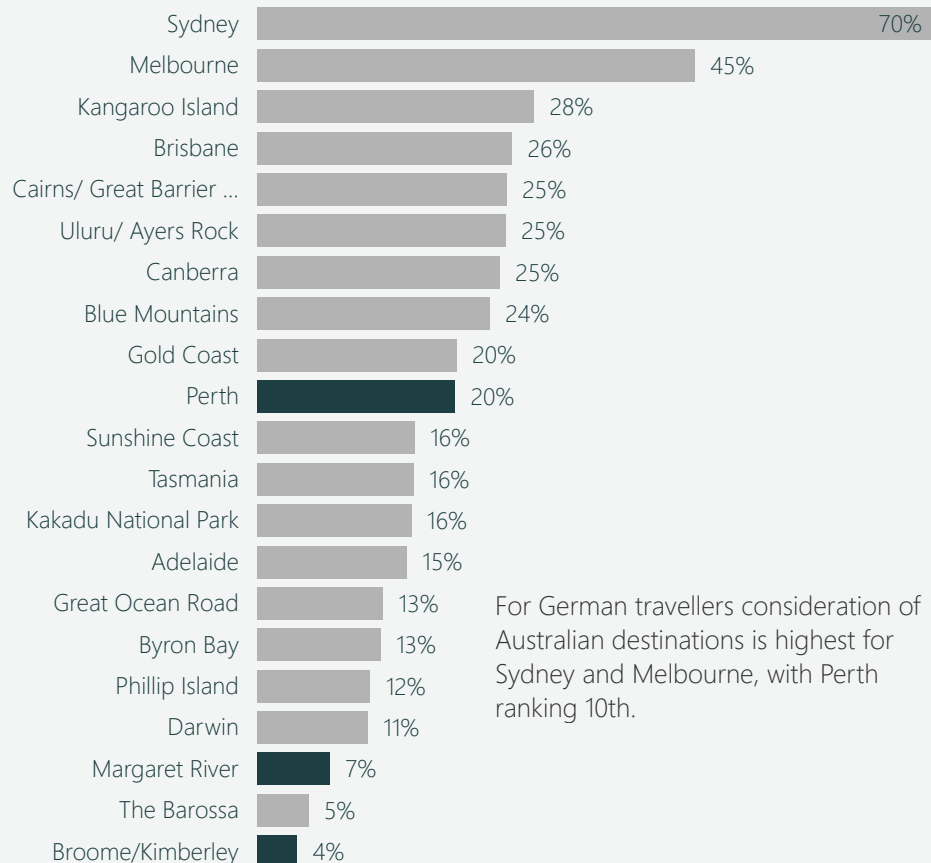
Out of region (OOR) travellers



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 ⁵

(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 ⁵

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

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 does. They also seek destinations that offer a good range of accommodation options, and world-class coastlines and beaches.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	33%	21%	14%	13%	7%	7%
A vibrant city lifestyle	62%	44%	21%	21%	4%	5%
Beautiful natural environments, including mountains, rivers, forests, beaches, and coastlines	12%	11%	8%	9%	16%	10%
Different and interesting local wildlife	11%	10%	7%	8%	9%	8%
Good food, wine/beverages, local cuisine and produce	43%	30%	18%	18%	6%	6%
Interesting events and festivals	45%	28%	13%	12%	5%	5%
Value for money	19%	14%	8%	10%	5%	5%

German travellers have the strongest associations for Sydney. Perth performs similarly to Brisbane, while Margaret River performs well for beautiful natural environments.

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NOTES & REFERENCES

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 24
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 23/24
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 24
5. Tourism Australia – Consumer Demand Project, October - December 2024.

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