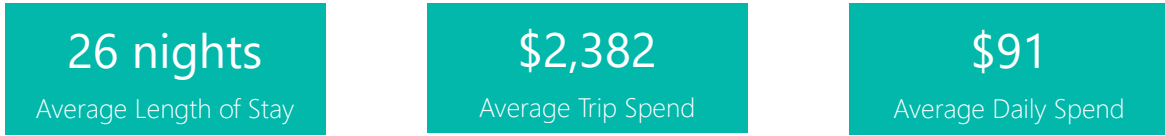


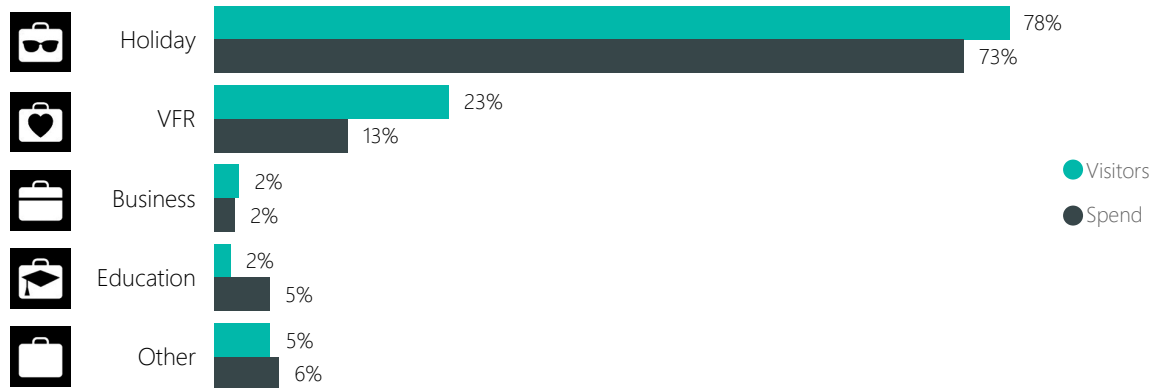
# GERMANY | MARKET PROFILE 2023

## MARKET OVERVIEW

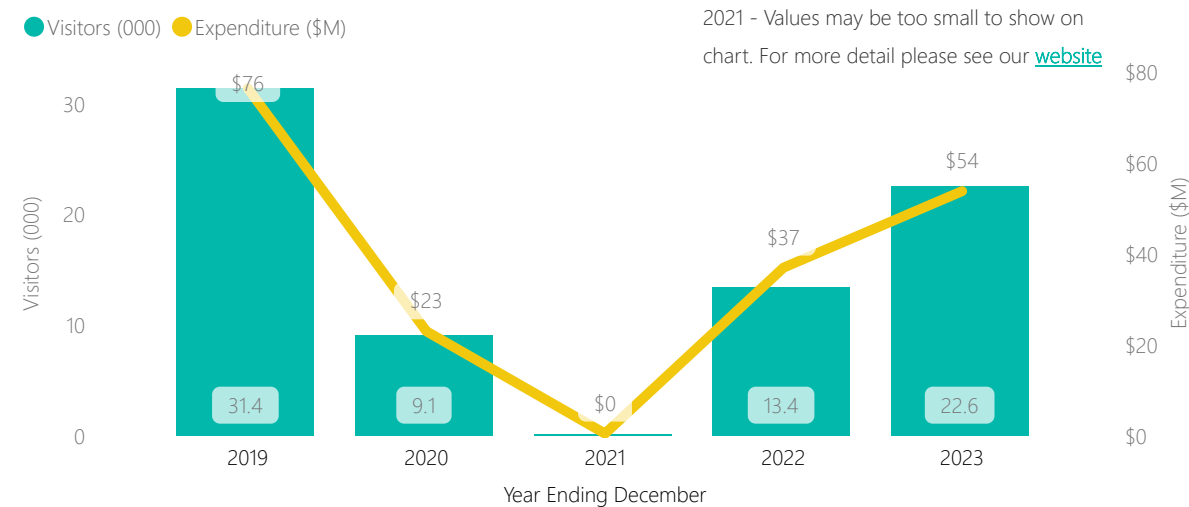
### Leisure Visitation to WA<sup>1</sup>



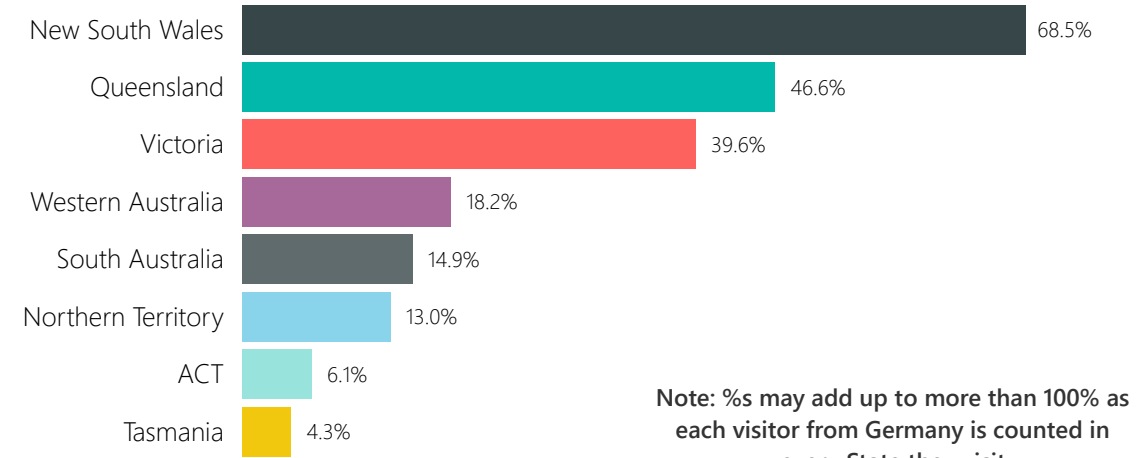
### International Visitors and Spend by Purpose (WA)<sup>1</sup>



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

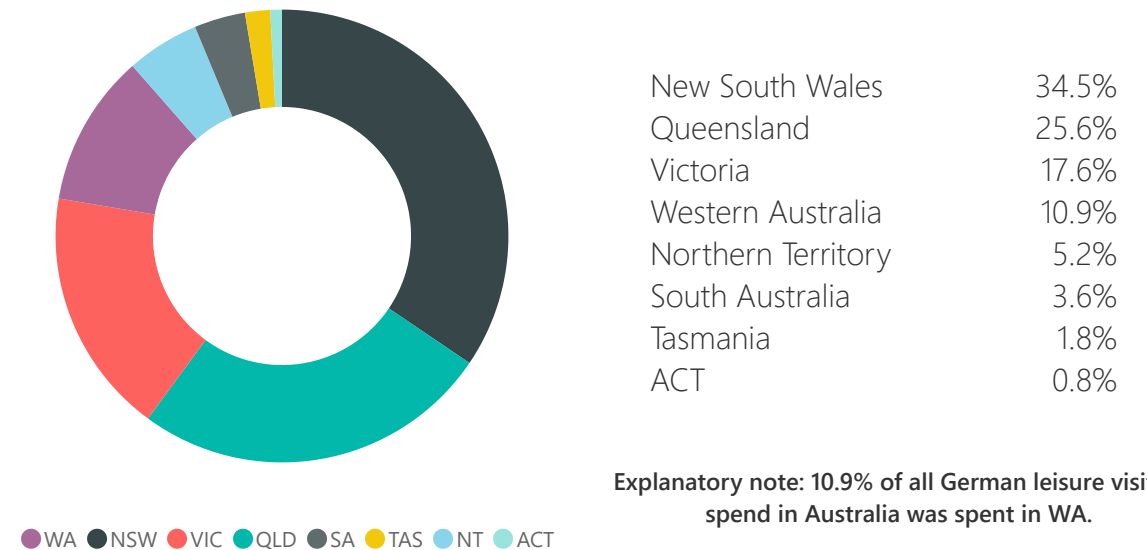


### Market Share of International Leisure Visitors to Australia<sup>1</sup>



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

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

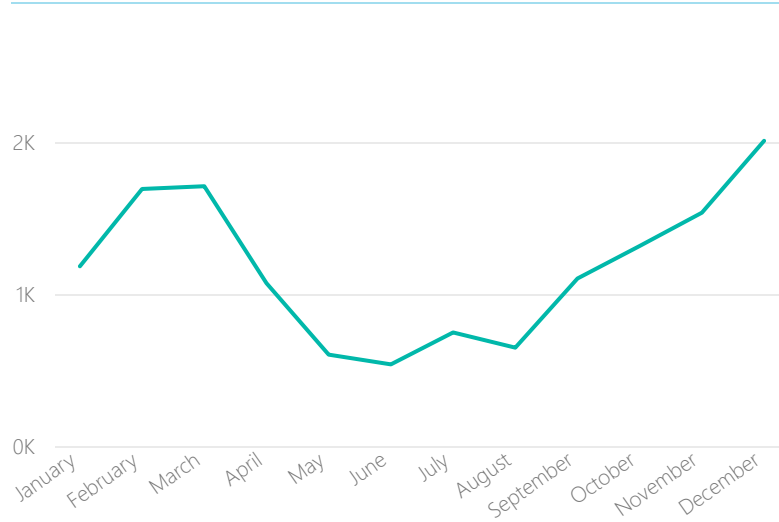


Explanatory note: 10.9% of all German leisure visitor spend in Australia was spent in WA.

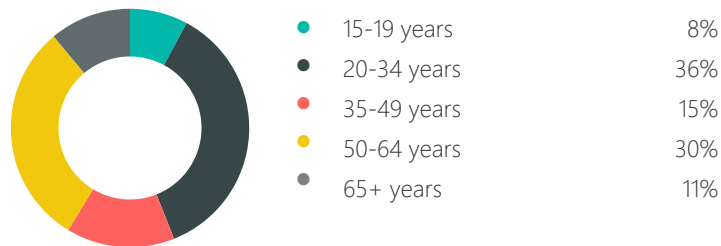
# GERMANY | MARKET PROFILE

## TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

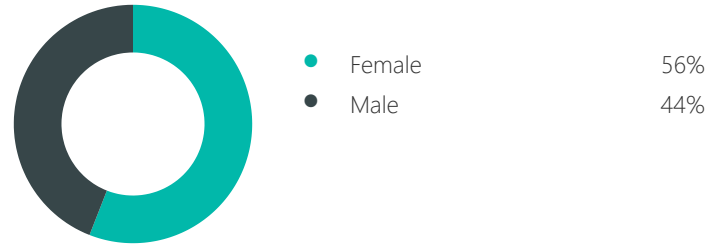
Seasonality - Short-term Leisure Visitor Arrivals to WA<sup>4</sup>



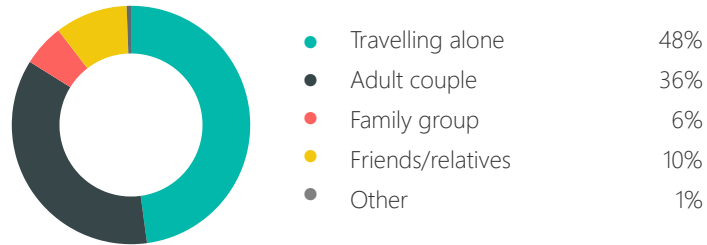
Age<sup>3</sup>



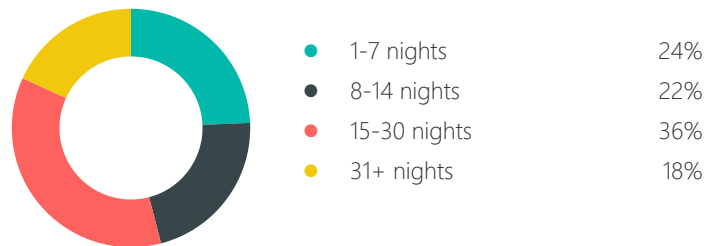
Gender<sup>3</sup>



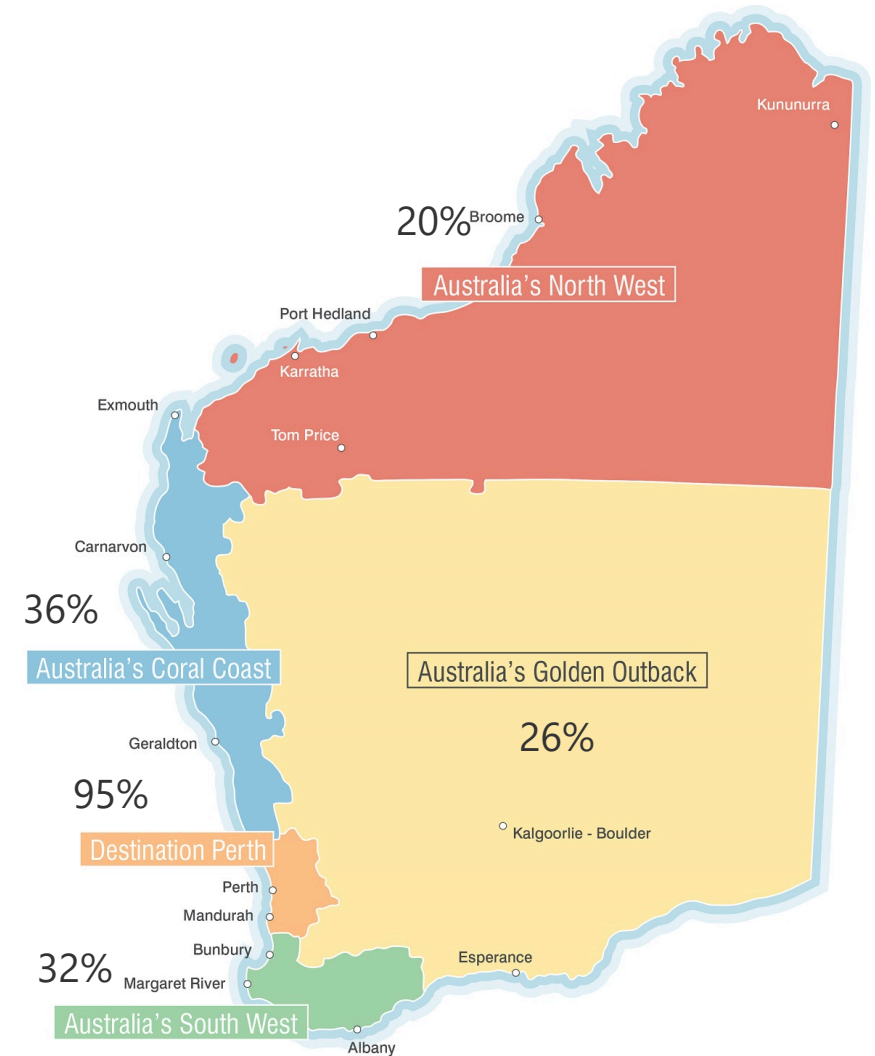
Travel Party<sup>3</sup>



Length of Trip<sup>3</sup>



Regional Dispersal<sup>3</sup>



# GERMANY | MARKET PROFILE

## TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

### Top 5 Activities for Leisure Visitors to WA<sup>3</sup>

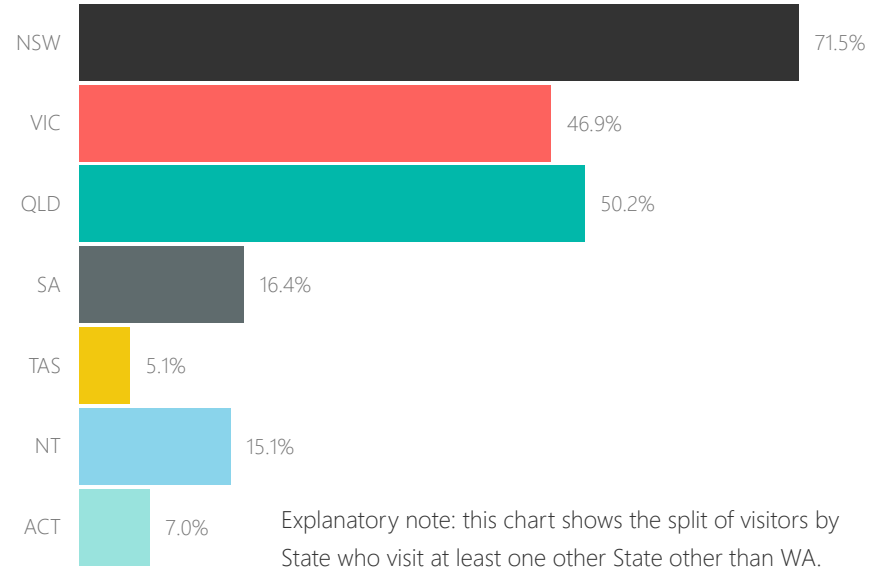
- |   |  |     |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 93% |
| ② | Go shopping for pleasure                   | 75% |
| ③ | Go to the beach                            | 90% |
| ④ | Sightseeing/looking around                 | 87% |
| ⑤ | Visit national parks / state parks         | 84% |

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

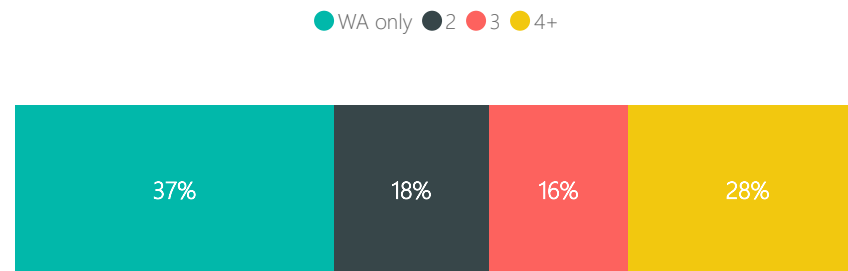
### Top 3 Accommodation Choices for Leisure Visitors to WA<sup>3</sup>

- |   |                                 |     |
|---|---------------------------------|-----|
| ① | Other commercial accommodation  | 54% |
| ② | Hotel/resort/motel or motor Inn | 45% |
| ③ | Other Private Accommodation     | 43% |

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



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



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

98% of German leisure visitors to WA are free independent travellers. Equally, 97% 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>

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

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

12% of German leisure visitors to WA arrived on a travel package

# GERMANY | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

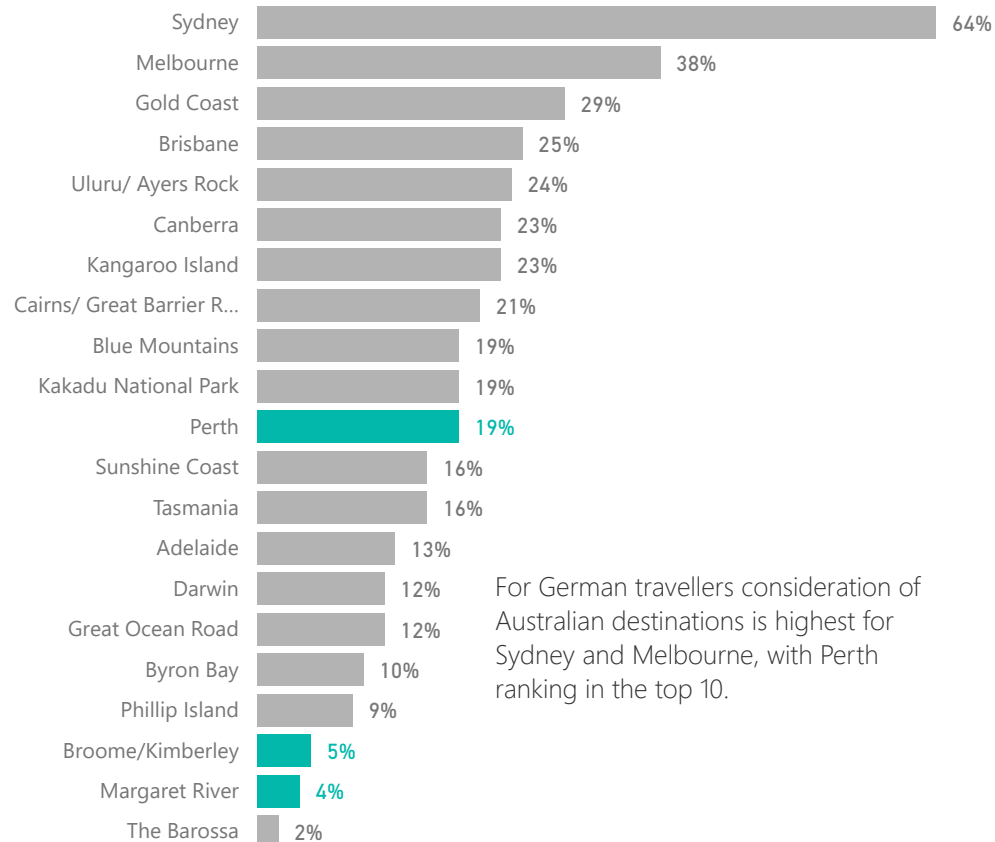
### Out of region (OOR) travellers



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 in the top 10.

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

- ① Value for money 47%
- ② Appealing climate or weather 38%
- ③ A safe and secure destination 38%
- ④ Beautiful natural environments e.g. mountains, rivers, forests 36%
- ⑤ Friendly and open citizens, local hospitality 31%
- ⑥ Clean and hygienic 27%

German travellers state that they are looking for value for money, appealing climate or weather and safety and security, with beautiful natural environments more important for them compared to the global aggregate.

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

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	32%	24%	15%	12%	9%	7%
A vibrant city lifestyle	61%	44%	25%	22%	3%	3%
Beautiful natural environments	17%	15%	11%	9%	16%	11%
Different and interesting local wildlife	13%	11%	8%	6%	10%	7%
Good food, wine/beverages	42%	34%	20%	18%	7%	7%
Interesting events and festivals	48%	29%	16%	15%	4%	4%
Value for money	18%	16%	10%	9%	6%	5%

German travellers associate Sydney and Melbourne with a vibrant city lifestyle and interesting events/festivals. Perth's highest association is with a vibrant city lifestyle whilst Margaret River and Broome/Kimberley are most strongly associated with beautiful natural environments.

# GERMANY | MARKET PROFILE

## 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 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
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 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

Published by Tourism WA, April 2024

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