

# GERMANY | MARKET PROFILE 2018-19

## MARKET OVERVIEW

### GERMANY LEISURE VISITATION TO WA<sup>1</sup>

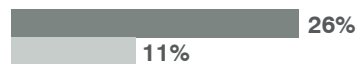
- **32,200** leisure visitors to WA
- WA's **7th largest** international market by leisure visitors
- **\$70.9 million** spent by leisure visitors in WA\*
- Average daily spend: **\$90**
- Average length of stay: **24 nights**

### VISITORS AND SPEND IN WA BY PURPOSE<sup>1</sup>

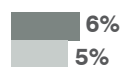
#### Holiday



#### Visiting Friends and Relatives



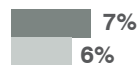
#### Business



#### Education



#### Other

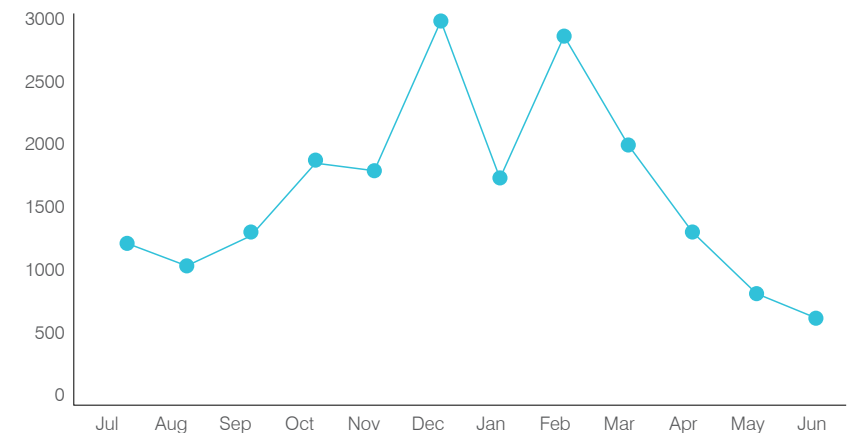


### GERMANY LEISURE VISITATION TO AUSTRALIA<sup>1</sup>

- **169,300** leisure visitors to Australia
- Australia's **11th largest** international market by leisure visitors

### SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA<sup>2</sup>

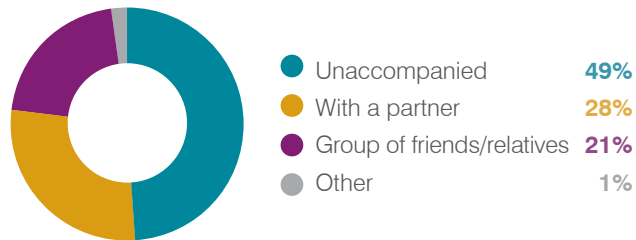
Arrivals peaked around the Christmas holiday period and February and eased during the Northern Hemisphere summer.



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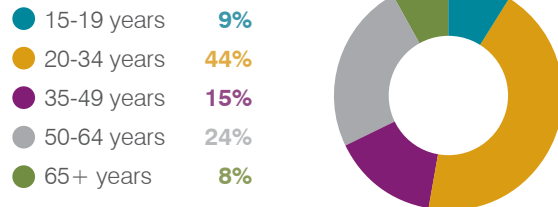
## TRIP PROFILE

### TRAVEL PARTY<sup>4</sup>

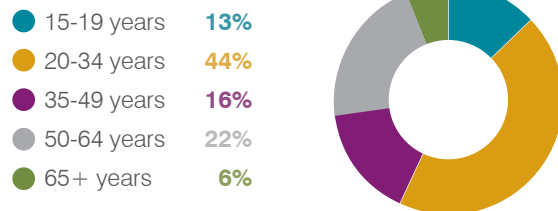


### LEISURE VISITORS BY AGE<sup>4</sup>

#### WA

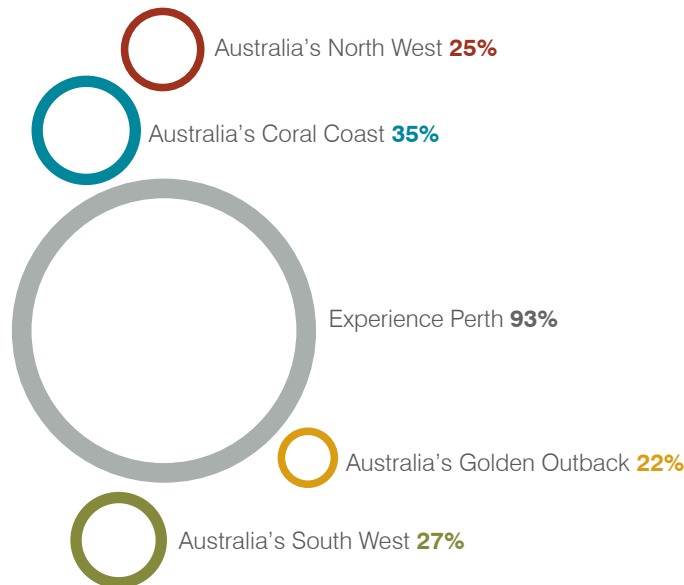


#### Australia



### REGIONAL DISPERSAL<sup>4</sup>

On average, **three in five** (60%) German leisure visitors to WA spend at least one night in Regional WA.



### TRAVEL PACKAGES<sup>4</sup>

**One in ten** (9%) of German leisure visitors to WA arrive on a **travel package**

(i.e. paid for their flight to Australia and at least one other component of their trip as one packaged price).

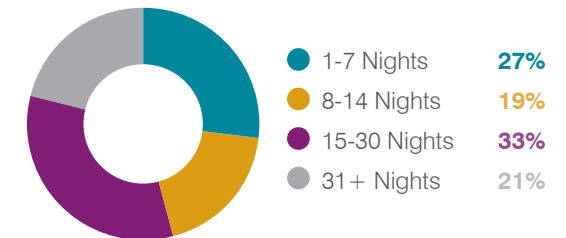
### REPEAT VISITORS<sup>4</sup>

**55%** of German leisure visitors to WA are on a **return visit** to Australia.

### OTHER STATES VISITED<sup>4</sup>

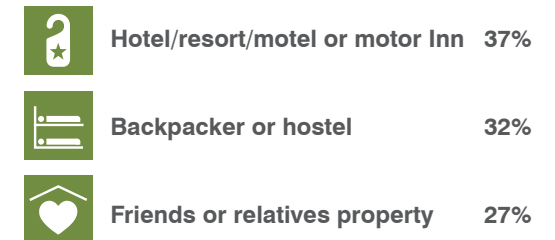
**Two in five** (38%) of German leisure visitors to WA **only visit WA** on their trip.

### LENGTH OF STAY – LEISURE VISITORS TO WA<sup>4</sup>



### TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA<sup>4</sup>

Proportion staying in this accommodation type (%)



On average, **three in five** (60%) German leisure visitors to WA caravan or camp, equivalent to an average of **11,900** German visitors a year<sup>4,^</sup>

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## MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

**High Value Travellers** (HVTs) are a new target audience for Tourism Western Australia.

### DEFINITION OF A HIGH VALUE TRAVELLER



Travel Long Haul



Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences



Considering or intending to visit Australia.



Represent "high value": above average trip expenditure, and a higher likelihood to stay longer and disperse further

### WHAT GERMAN HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY<sup>3</sup>



World class nature & wildlife



A safe and secure destination



World class coastlines, beaches and marine wildlife



Good food, wine, local cuisine and produce



Friendly and open citizens, local hospitality

### HVTs BARRIERS TO VISITING AUSTRALIA<sup>3</sup>

The most commonly cited barrier preventing German HVTs from visiting Australia is the **cost of airfares**, yet on-the-ground costs come much lower down the list. Competition from **other overseas destinations** and the perception Australia is **too far to travel** also prevent German HVTs visiting the country. Further promotion of WA's unique and iconic **nature/wildlife/aquatic experiences** and **example itineraries** for shorter trips are likely to be compelling for this market and drive intention to visit.

#### Top 3 Barriers to visiting Australia



Expensive airfares



Planned a holiday to another destination



It is too far to travel

### HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES<sup>5</sup>

Based on last out of region holiday

Based on their last holiday, German HVTs tend to **decide on their holiday destination** and **make their first booking** around **3-6 months before** their trip.

### HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING<sup>3</sup>

#### Inspiration



Talking to F&R



General internet searching



Been there before



Travel/guide books



Online flights booking site

#### Booking



**Flights**  
Airline (online)  
Travel website/app  
Travel agent (offline)



**Activities**  
Travel agent (offline)  
Operator (online)  
Travel website/App



**Accommodation**  
Travel website/app  
Travel agent (offline)  
Accomm. Provider (online)

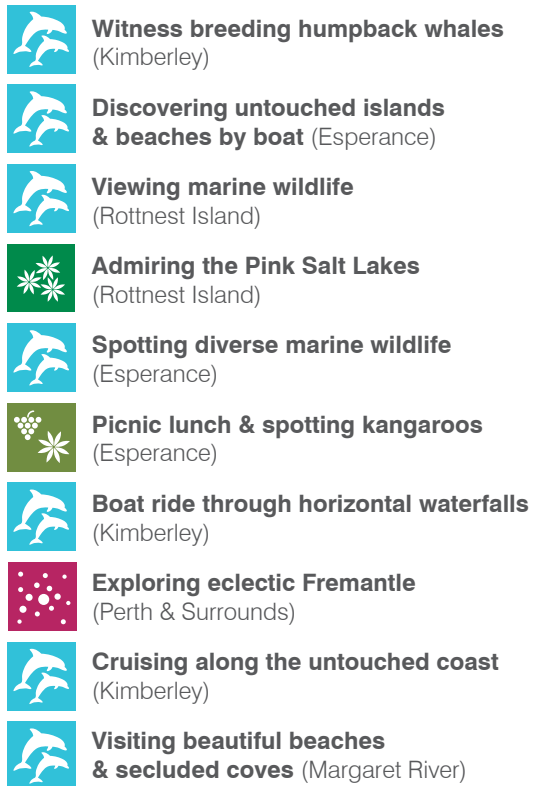
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## APPEALING WA DESTINATIONS AND EXPERIENCES

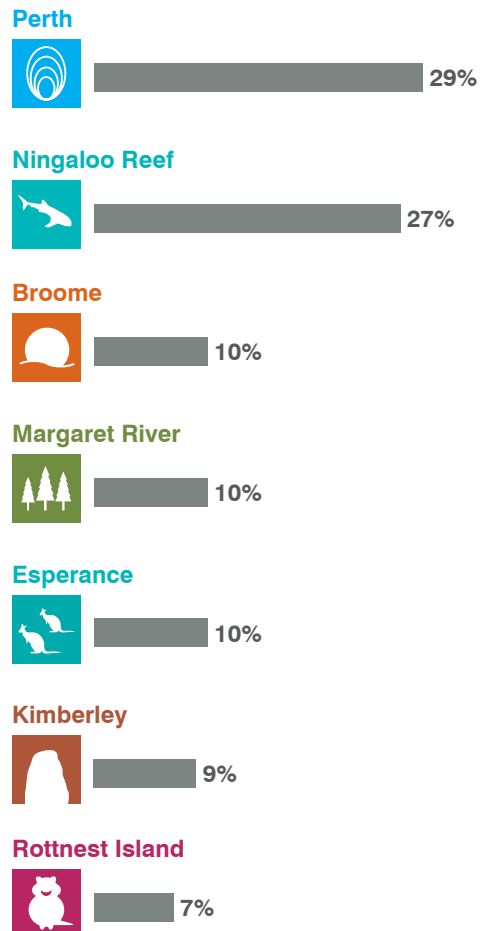
In research undertaken in 2018, **German HVTs** were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that Perth and Ningaloo Reef are the standout destinations for German HVTs. Aquatic and natural experiences dominate the most appealing experiences whilst wildlife is also a common theme.

### MOST APPEALING EXPERIENCES<sup>5</sup>



### MOST APPEALING DESTINATION<sup>5</sup>



### WHY THESE DESTINATIONS AND EXPERIENCES APPEAL<sup>5</sup>

#### Perth & Surrounds

*"Beautiful landscape and nature that does not exist in our country"*

*"Wine, urban atmosphere, attractive destinations in the area"*

*"Big city and culture, beaches and nature"*

#### Ningaloo Reef

*"To get up close & personal with the reef and get an unforgettable view of the underwater world"*

#### Broome

*"Experience pink diamonds, cultural sites, adventure tours"*

### Notes

\* Expenditure excludes pre-paid package spend.

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

^ 'Caravan and camping visitors' spent at least one night in commercial or non-commercial caravan or camping accommodation while on their trip

### References

1. Tourism Research Australia – International Visitor Survey, YE Jun 19
2. 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 Jun 19
3. Tourism Australia – Consumer Demand Project 2019 Germany Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Jun 2017/18/19)
5. BDA – International High Value Travellers - Western Australia State Report, 2019

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