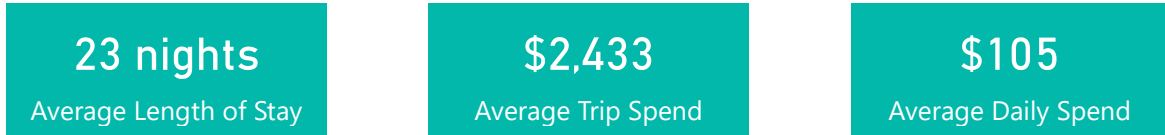


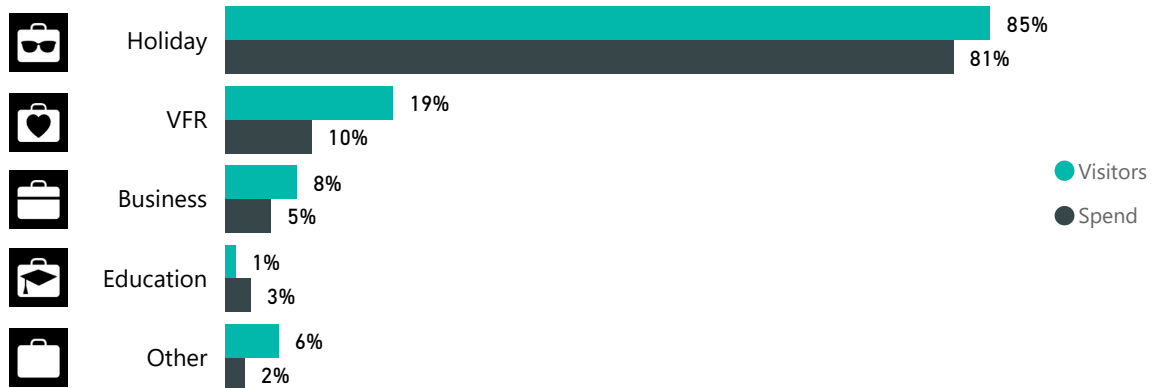
GERMANY | MARKET PROFILE 2022

MARKET OVERVIEW

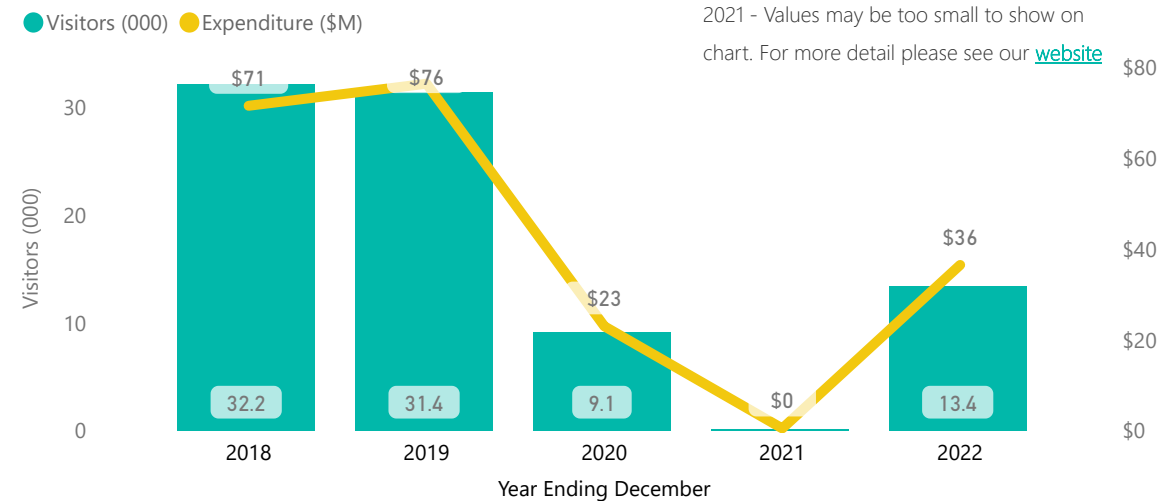
Leisure Visitation to WA¹



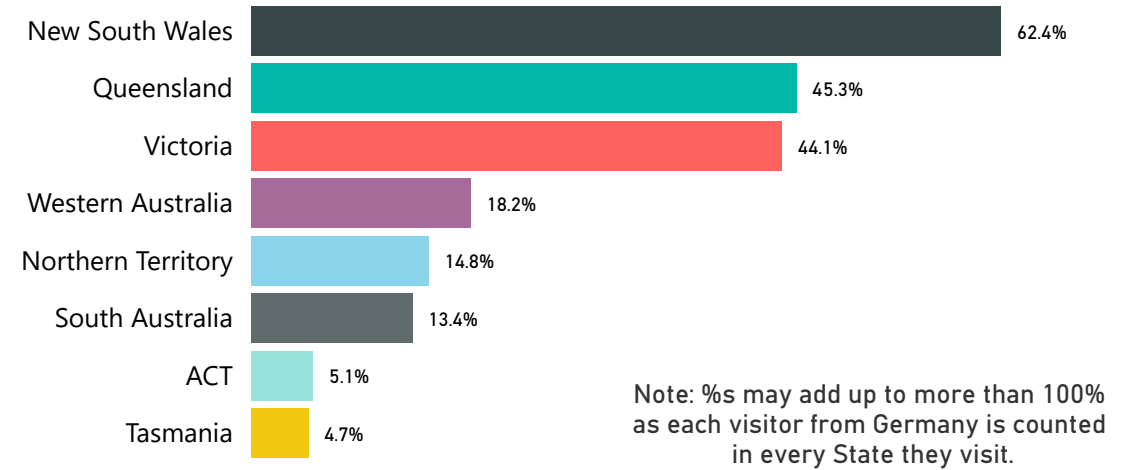
International Visitors and Spend by Purpose (WA)¹



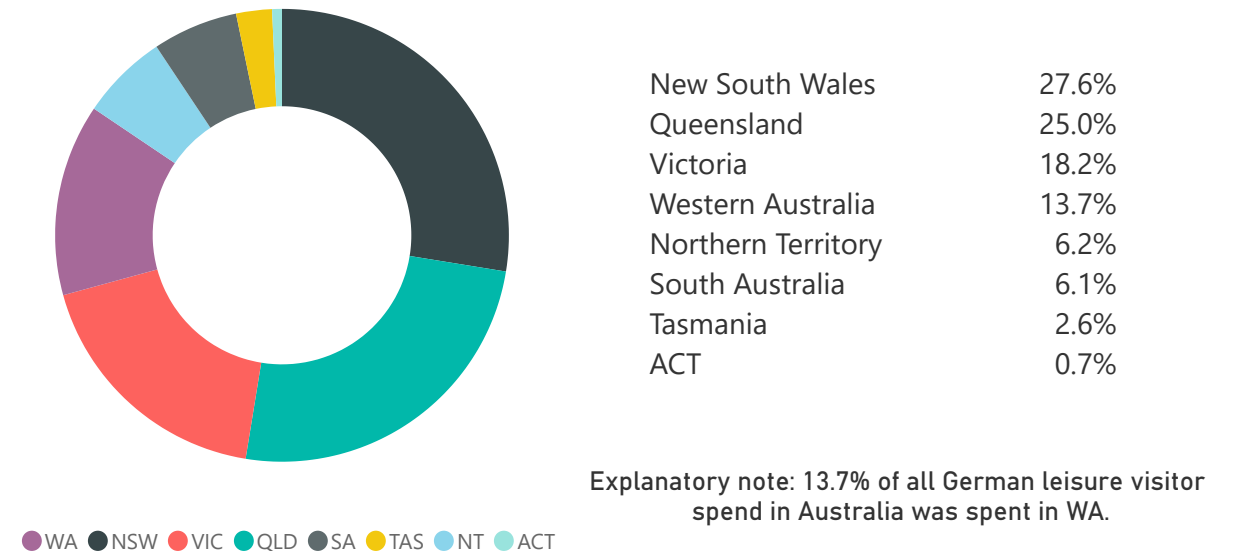
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



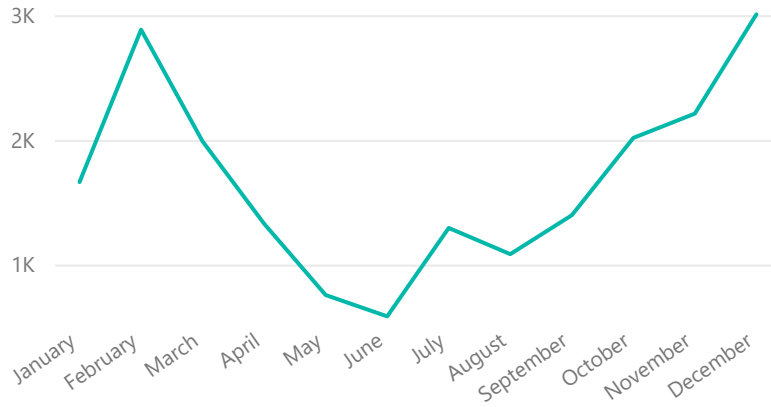
Market Share of International Leisure Visitor Spend in Australia¹



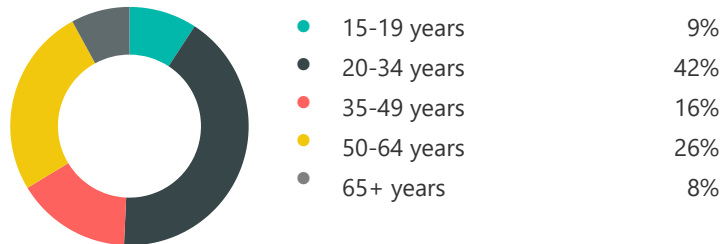
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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

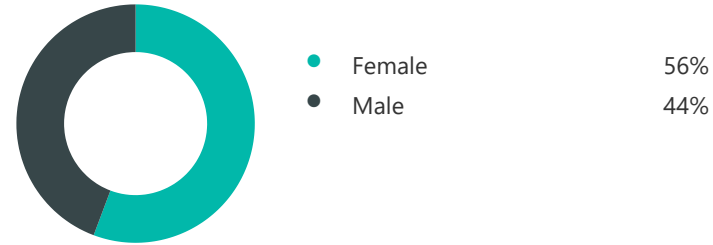
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



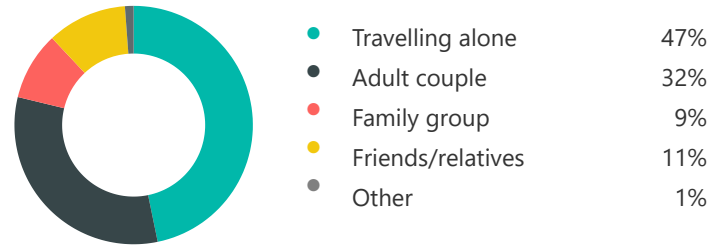
Age³



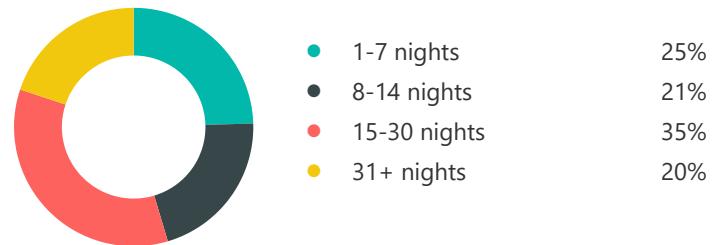
Gender³



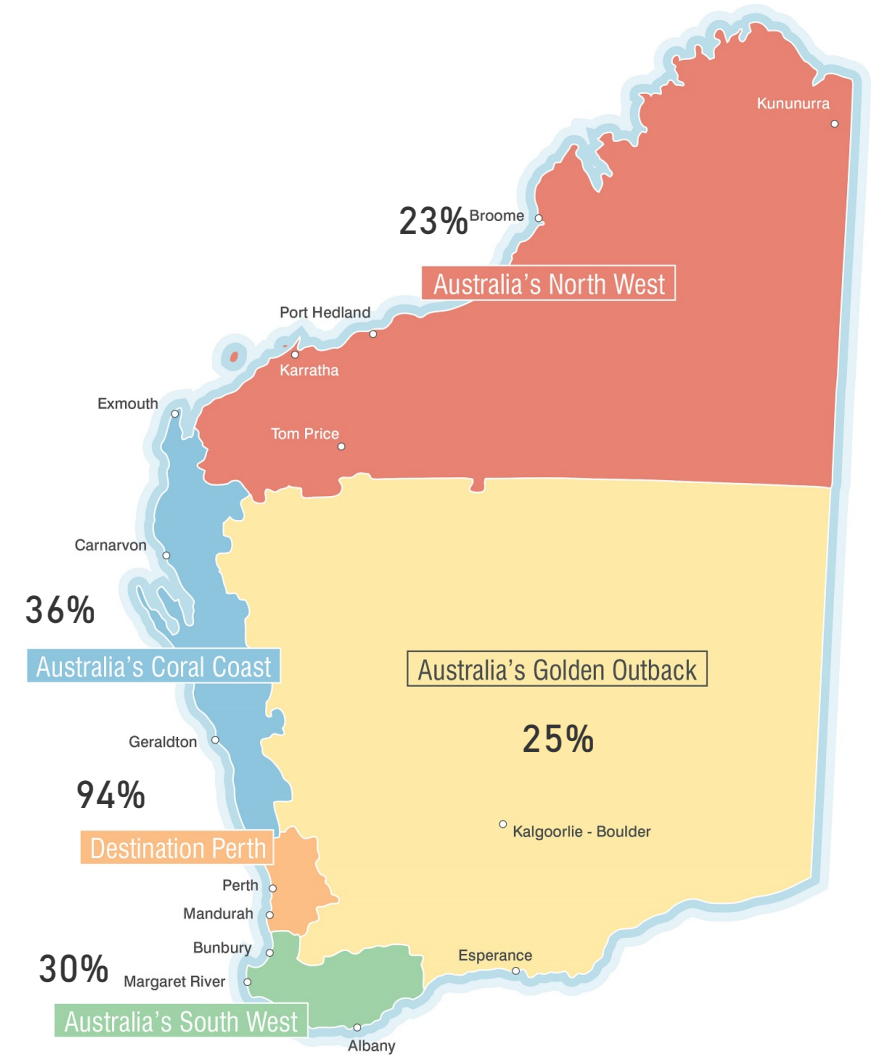
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

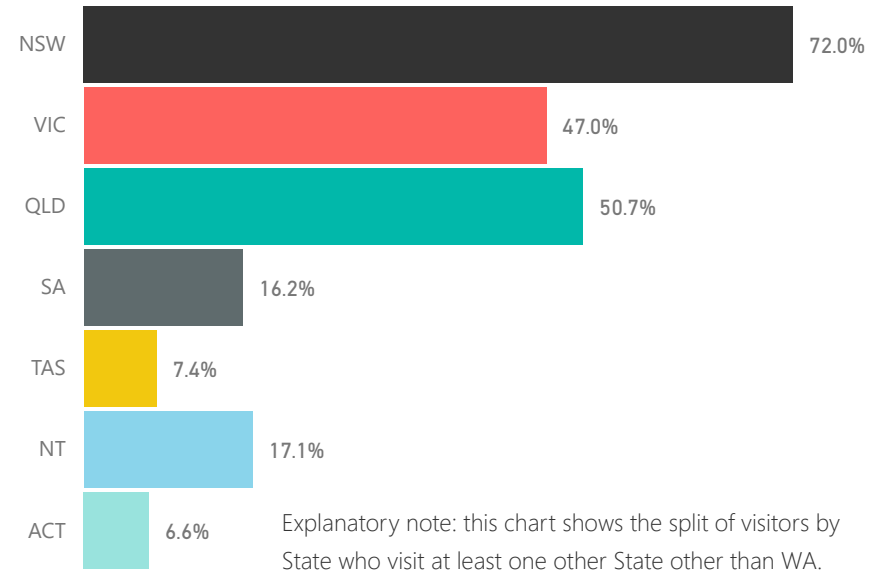
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 91% |
| ② | Go shopping for pleasure | 73% |
| ③ | Go to the beach | 88% |
| ④ | Sightseeing/looking around | 86% |
| ⑤ | Visit national parks / state parks | 84% |

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

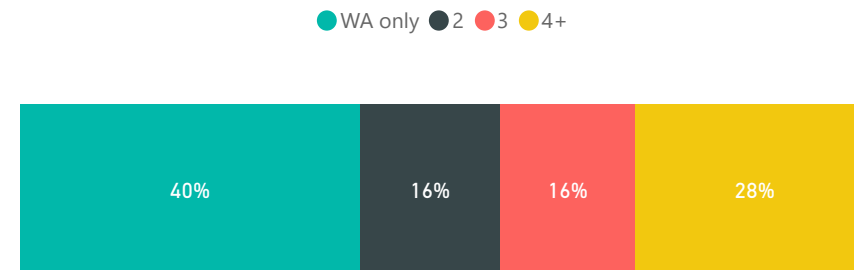
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|--------------------------------|-----|
| ① | Other commercial accommodation | 59% |
| ② | Other Private Accommodation | 52% |
| ③ | Caravan or camping | 38% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

98% of German leisure visitors to WA are free independent travellers. Equally, 98% 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 Visitors³

57% of German leisure visitors to WA are on a return visit to Australia

Travel Packages³

9% of German leisure visitors to WA arrived on a travel package

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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 World class natural beauty
- 2 Safety & security
- 3 Friendly citizens
- 4 Good food & wine
- 5 World class aquatic & coastal

World class natural beauty now the most important factor amongst German travellers, more important than for other markets and lifting in importance. Safety follows. Friendly citizens and aquatic and coastal are also well above average.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 Talking to F&R
- 2 General internet searching
- 3 Been there before
- 4 Travel/guide books
- 5 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)

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 It is too far to travel
- 2 Expensive airfares
- 3 There are other places I would prefer to travel to/ have planned to travel to
- 4 High cost of travelling around
- 5 The current financial/economic situation is not favourable

Distance to travel to Australia and related costs are the biggest barriers for German travellers. Also the sustainability factor around taking a flight to Australia is significantly higher compared to other markets. Promote affordable nature experiences and sustainable products to encourage this market.

GERMANY | MARKET PROFILE

APPEALING WA DESTINATIONS AND EXPERIENCES

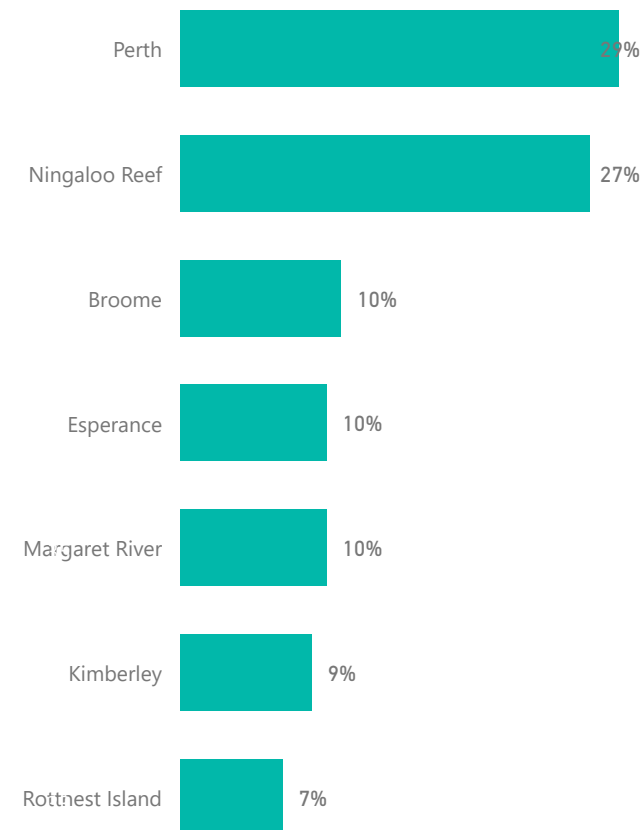
In research undertaken in 2018, German HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

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

Most Appealing Experiences⁷

- 1 Witness breeding humpback whales**
(Kimberley)
- 2 Discovering untouched islands & beaches by boat**
(Esperance)
- 3 Viewing marine wildlife**
(Rottnest Island)
- 4 Admiring the Pink Salt Lakes**
(Rottnest Island)
- 5 Spotting diverse marine wildlife**
(Esperance)
- 6 Picnic lunch & spotting kangaroos**
(Esperance)
- 7 Boat ride through horizontal waterfalls**
(Kimberley)
- 8 Exploring eclectic Fremantle**
(Perth & Surrounds)
- 9 Cruising along the untouched coast**
(Kimberley)
- 10 Visiting beautiful beaches & secluded coves**
(Margaret River)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Broome

"Experience pink diamonds, cultural sites, adventure tours"

Ningaloo Reef

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

Perth & Surrounds

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

"Big city and culture, beaches and nature"

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

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
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 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

For more information, please contact: research@westernaustralia.com