GERMANY LEISURE VISITATION TO WA
- 30,600 leisure visitors to WA
- WA’s 7th largest international market by leisure visitors

$52.2 million spent by leisure visitors in WA
- Average daily spend: $69
- Average length of stay: 25 nights

GERMANY LEISURE VISITATION TO AUSTRALIA
- 174,700 leisure visitors to Australia
- Australia’s 11th largest international market by leisure visitors

SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA
Arrivals peaked around the Christmas holiday period and eased during the Northern Hemisphere summer.
Concept testing of a range of tourism experiences in Australia and overseas reveals that the most favoured Australian experiences are those that feature aquatic and coastal elements. Nature and wildlife experiences are also highly appealing. German travellers have a relatively high preference for history and cultural experiences in Australia, suggesting this market could be a core market for such experiences in WA, particularly Aboriginal tourism experiences.

**Australian experiences**
Average of position of Australian experience featuring each theme

- Aquatic and Coastal
- History and Culture
- City
- Food and Wine
- Natural Beauty and Wildlife
TRAVEL PARTY

- Unaccompanied: 53%
- With a partner: 26%
- Group of friends/relatives: 20%
- Other: 1%

LEISURE VISITORS BY AGE

<table>
<thead>
<tr>
<th>Age Group</th>
<th>WA</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-19 years</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>20-34 years</td>
<td>47%</td>
<td>46%</td>
</tr>
<tr>
<td>35-49 years</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>50-64 years</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>65+ years</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

REGIONAL DISPERSAL

- More than half (an average of 59%) of German leisure visitors to WA spend at least one night in Regional WA.
- Australia’s Coral Coast: 34%
- Experience Perth: 25%
- Australia’s Golden Outback: 18%
- Australia’s South West: 29%

TRAVEL PACKAGES

- 7% 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

- Half (51%) of German leisure visitors to WA are on a return visit to Australia.

OTHER STATES VISITED

- A third (34%) of German leisure visitors to WA only visit WA on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA

- 1-7 Nights: 22%
- 8-14 Nights: 24%
- 15-30 Nights: 29%
- 31+ Nights: 25%

TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA

- Hotel/resort/motel or motor Inn: 35%
- Backpacker or hostel: 33%
- Friends or relatives property: 30%

OTHER STATES VISITED

- A third (34%) of German leisure visitors to WA only visit WA on their trip.

Prepared by the Tourism WA Strategy and Research Team
BARRIERS TO VISITING AUSTRALIA

By far the biggest barrier to attracting more German visitors is distance, and this was a far larger barrier for this market than for international markets in general. Competition from other overseas destinations and the perception that too much time is needed to “do” an Australian holiday also prevent German travellers 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

- It is too far to travel
- There are just other places I would prefer to travel to
- I don’t have enough annual leave

DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES

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

TOP 5 SOURCES FOR INSPIRATION, INFORMATION & BOOKING

Based on last out of region holiday

When searching for inspiration and planning their next out of region trip, use of online sources is below average compared to other international markets. Word of mouth is by far the most popular source of information, with guidebooks and internet browsing also important. When it comes to booking out of region travel, offline travel agents continue to be the most used, although their popularity has begun to ease a little.

<table>
<thead>
<tr>
<th>Inspiration</th>
<th>Booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word of mouth</td>
<td>Travel agent (telephone or in person)</td>
</tr>
<tr>
<td>Travel or guide books</td>
<td>Directly through airline (online)</td>
</tr>
<tr>
<td>General internet browsing</td>
<td>Travel agent (online)</td>
</tr>
<tr>
<td>Travel agent (telephone or in person)</td>
<td>Accommodation provider (online)</td>
</tr>
<tr>
<td>Travel brochures</td>
<td>Tour Operator (online)</td>
</tr>
</tbody>
</table>

Prepared by the Tourism WA Strategy and Research Team
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.

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   (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 17
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