

GERMANY

Visitor & Market Insights

July 2026



**100% PURE
NEW ZEALAND**

TOURISM NEW ZEALAND'S MARKET APPROACH

Our Purpose

Enrich Aotearoa New Zealand and all who visit.

- Tourism must enrich New Zealand and the wellbeing of New Zealanders – contributing more than what it takes.
- Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud.

Our Role

To promote New Zealand as a visitor destination to key markets around the world. Tourism New Zealand's strategy is focused on driving year-round arrivals to support economic growth.

Market Approach

Tourism New Zealand (TNZ) focuses on shaping the visitor mix through activity across a diverse portfolio of markets.

Our markets are determined by factors including there being an existing or potential group of people actively considering New Zealand as a destination.

Active Considerers

These are international holiday travellers, aged 18-74, who find New Zealand highly appealing. New Zealand is among their top 5 preferred destinations to visit, they have serious intentions to visit in the next 3 years, and they have a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverages a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Stats NZ's International Visitor Arrivals and MBIE's International Visitor Survey.

Markets

The markets covered in our Snapshots include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom
- India
- Singapore



VISITOR INSIGHTS

International Visitor Arrivals

International arrivals sourced from Stats NZ; includes non-New Zealand or New Zealand residents living overseas who are arriving for a stay of less than 12 months

International Visitor Survey

International Visitor Survey (IVS) commissioned by the Ministry of Business, Innovation and Employment (MBIE); captures survey data from international visitors shortly after their trip to New Zealand

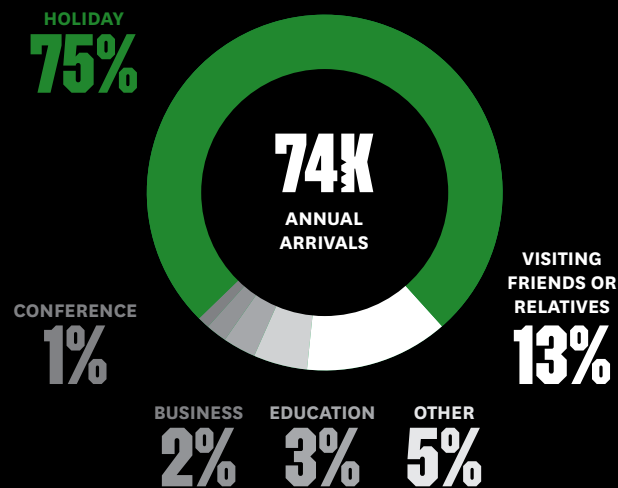
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VISITOR INSIGHTS | ARRIVALS

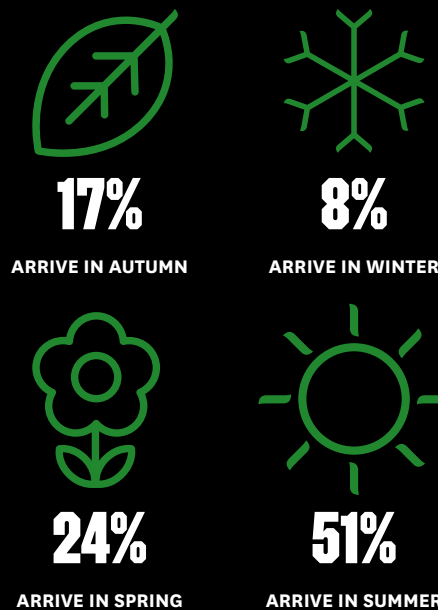


Germany delivered 74,000 arrivals last year, with holiday travel accounting for three-quarters of visitors (75%). Visitation is highly seasonal, with more than half of arrivals occurring during summer (51%)

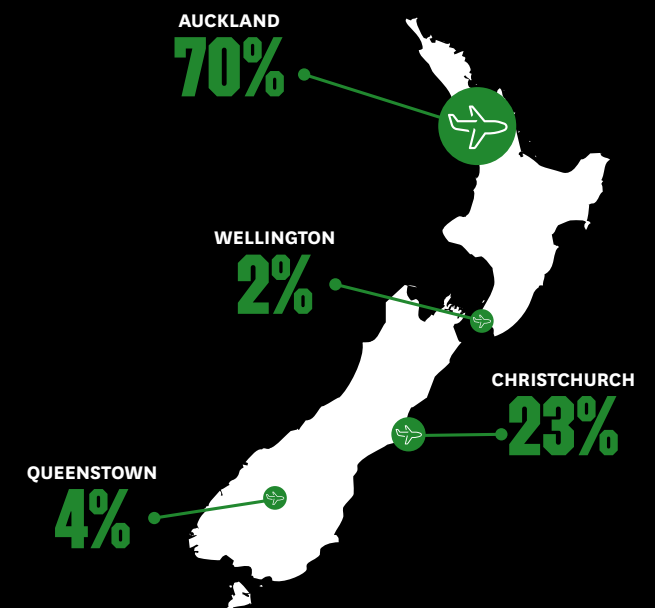
HOLIDAY TRAVEL OVERWHELMINGLY DRIVES GERMAN VISITATION



SUMMER ACCOUNTS FOR MORE THAN HALF OF ANNUAL ARRIVALS



AUCKLAND IS THE PRIMARY GATEWAY FOR GERMAN VISITORS



Source: Stats NZ International Visitor Arrivals – all arrivals – year ending March 2026

Seasons: Autumn 25/26 (April and May 2025 and March 2026), Winter 25 (June–August 2025), Spring 25 (September–November 2025), and Summer 25/26 (December 2025–February 2026).

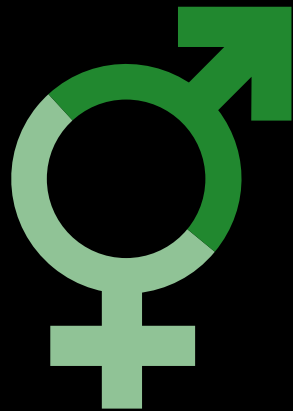
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VISITOR INSIGHTS | WHO THESE HOLIDAYMAKERS ARE



German holiday visitors are led by those aged 25–34 (23%), while those aged 15–24 and 55–64 each contribute 17%. Longer stays are a defining characteristic, with 62% staying 15 days or more

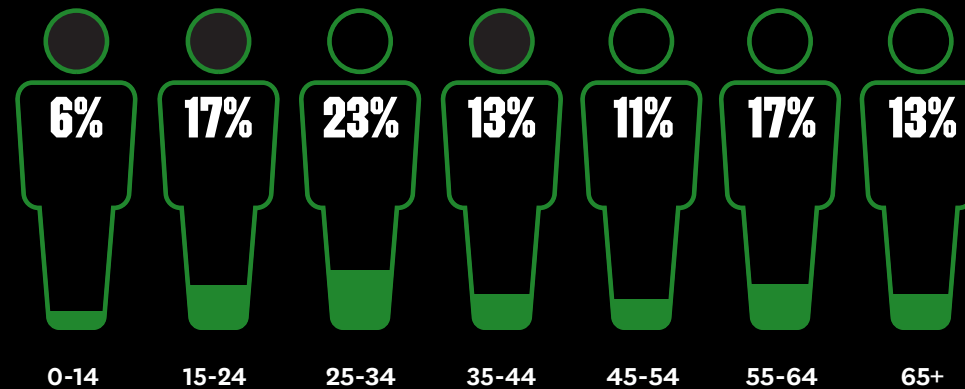
GENDER REPRESENTATION IS BROADLY BALANCED



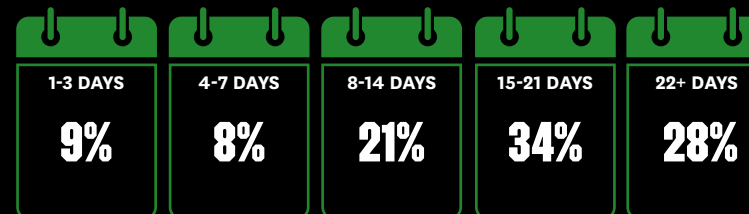
52%
FEMALE

48%
MALE

BROAD REPRESENTATION ACROSS ALL AGE GROUPS



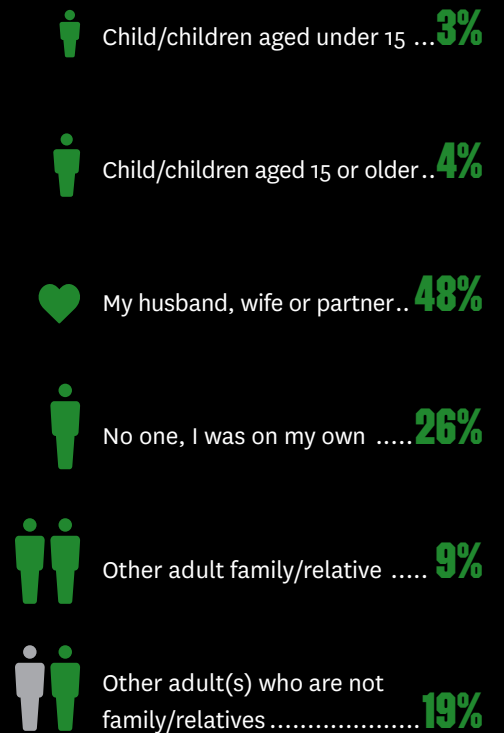
LENGTH OF STAY (DAYS)



AVERAGE LENGTH OF STAY



COUPLES DOMINATE TRAVEL PARTIES, WHILE SOLO TRAVEL IS ALSO COMMON



Less than 0.5% of visitors selected 'Another gender'

Sources: Stats NZ International Holiday Arrivals | Year Ending March 2026

International Visitor Survey | Year ending March 2026 | Holiday Visitors (Travel Party)

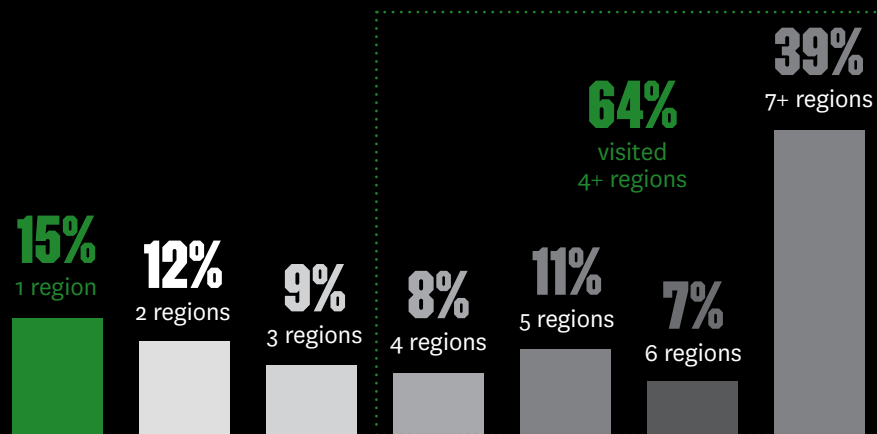
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VISITOR INSIGHTS | WHERE THEY GO



German holidaymakers are New Zealand's most geographically dispersed visitors. Nearly two-thirds visit both islands (64%), while almost four in ten (39%) visit seven or more regions during their trip, reflecting a strong preference for extended exploration

GERMAN VISITORS TYPICALLY BUILD MULTI-REGION ITINERARIES SPANNING THE LENGTH OF NEW ZEALAND

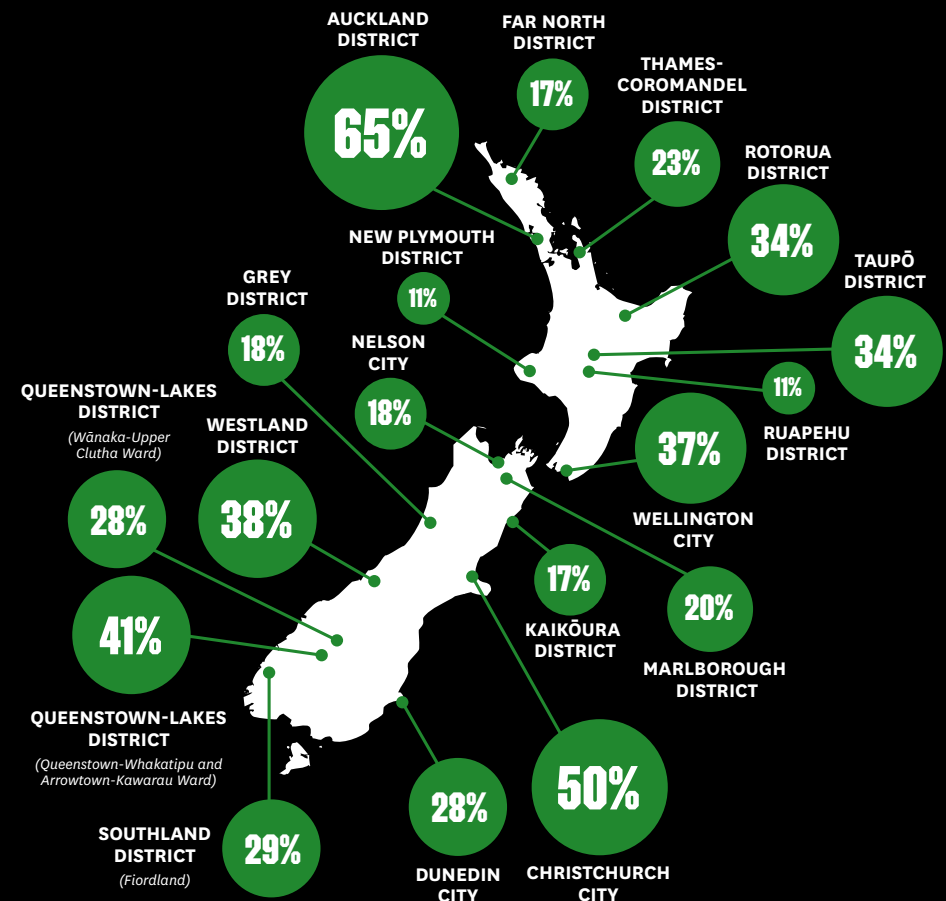


NEARLY TWO-THIRDS EXPLORE BOTH ISLANDS



Source: MBIE, International Visitor Survey | Year ending March 2026 | Holiday Visitors

AUCKLAND, A KEY ENTRY PORT, IS THE MOST VISITED DESTINATION, FOLLOWED BY CHRISTCHURCH AND QUEENSTOWN

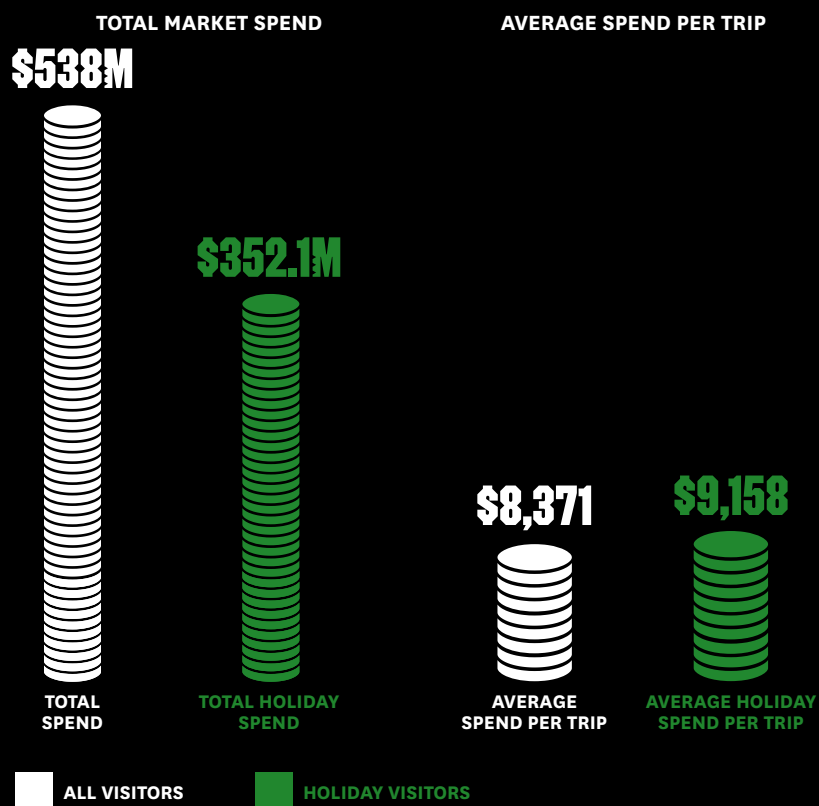


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VISITOR INSIGHTS | HOW MUCH THEY SPEND



German visitors contributed over \$500 million to the New Zealand economy, including NZ\$352 million from holiday travel. Long stays drive high visitor value, with holidaymakers spending an average of NZ\$9,158 per trip— the highest levels across New Zealand's key visitor markets



ACCOMMODATION AND VEHICLE HIRE ACCOUNT FOR NEARLY HALF OF HOLIDAY EXPENDITURE, REFLECTING A PREFERENCE FOR INDEPENDENT, SELF-DRIVE TRAVEL

ACCOMMODATION



23%

FOOD AND BEVERAGE



9%

SHOPPING



4%

CAR RENTAL



24%

ENTERTAINMENT



9%

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VISITOR INSIGHTS | WHAT THEY DO



German holidaymakers engage heavily with New Zealand's natural environment, with beaches, walking and hiking, national parks, and scenic landscapes among the most popular experiences. Geothermal attractions, glaciers, Māori cultural sites, and film locations further enrich the visitor experience

TOP ACTIVITIES ENJOYED BY GERMANS ON HOLIDAY IN NEW ZEALAND



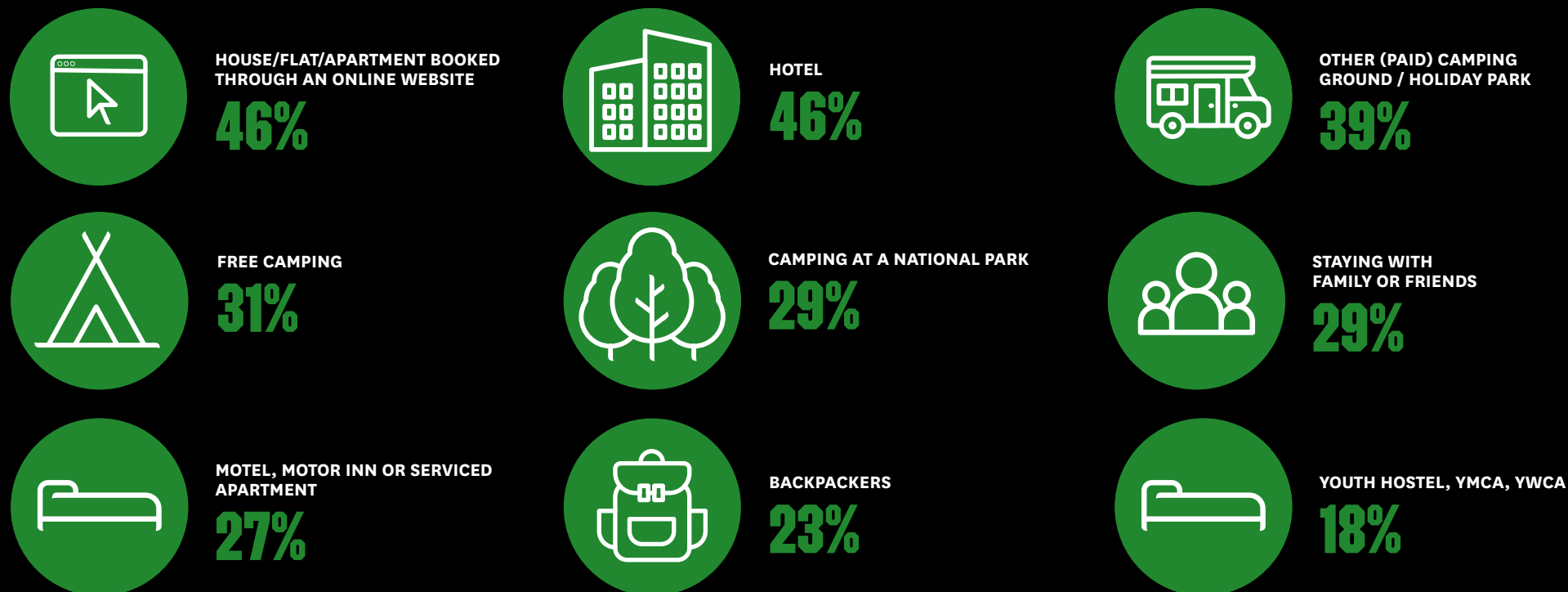
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VISITOR INSIGHTS | WHERE THEY STAY



Accommodation preferences reflect a strong independent travel culture. Visitors use a diverse range of accommodation types, with online-booked rentals and hotels equally popular (46%). Camping, holiday parks, hostels, and backpacker accommodation are also widely used

POPULAR ACCOMMODATION TYPES



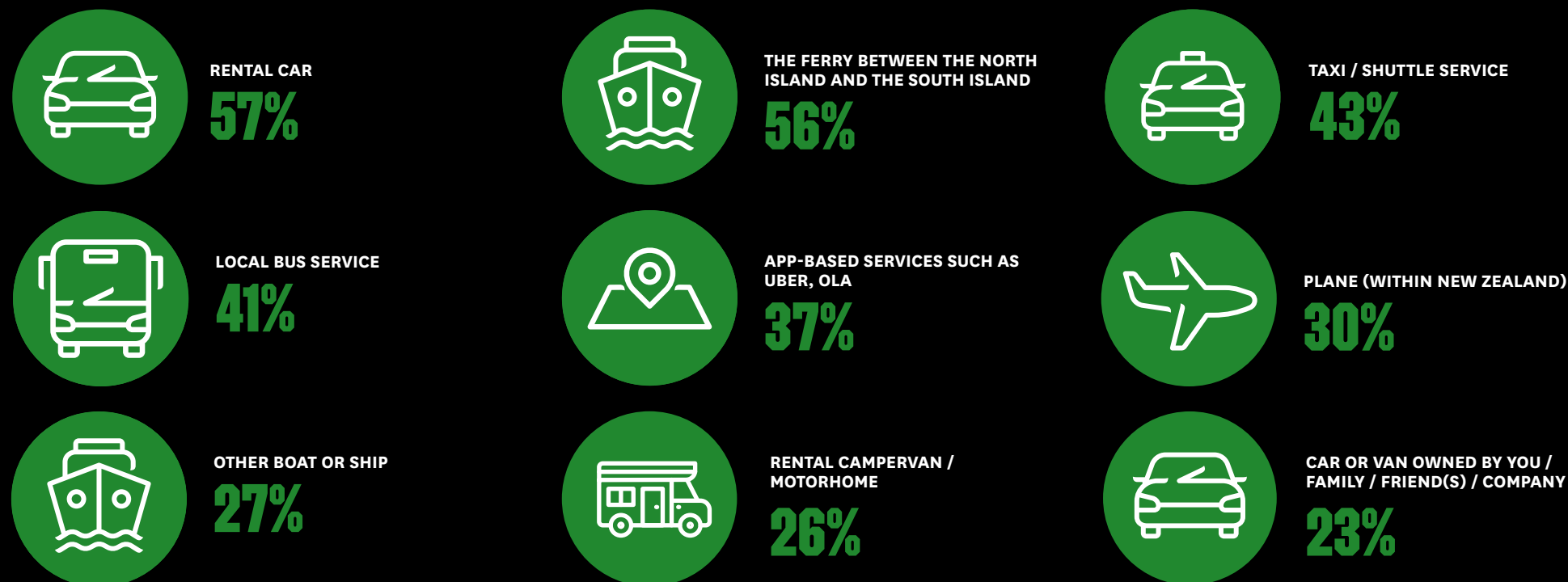
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VISITOR INSIGHTS | HOW THEY TRAVEL



Rental car travel and inter-island travel underpin German itineraries. Public transport, domestic flights, campervans, and rideshare services support extensive exploration

HOW THEY TRAVEL



OUR FUTURE TRAVELLERS

Active Considerers

Who qualifies as an Active Considerer?

Active Considerers are travellers who meet all four criteria:

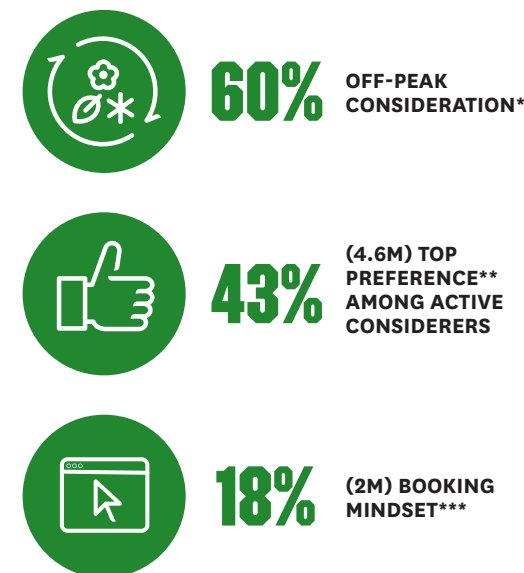
- **High appeal** – Find New Zealand highly appealing as a holiday destination
- **Strong intent** – Would seriously consider visiting in the next three years
- **Destination preference** – Agree that New Zealand is a preferred destination for their next holiday
- **Realistic budget** – Have a minimum spend level aligned to the market

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ACTIVE CONSIDERERS | JOURNEY FUNNEL



An estimated 11 million German travellers qualify as Active Considerers, with 43% ranking New Zealand as their preferred destination. Interest extends beyond the peak season, with 60% willing to travel during off-peak periods



*Off-Peak Consideration: Would consider travelling during autumn, winter, or spring, in addition to or instead of summer.

**Top Preference: Rank New Zealand as their #1 destination choice

***Booking Mindset: Ready to make firm bookings or have already booked their trip

Source: Active Considerer Monitor data six-month period ending May 2026

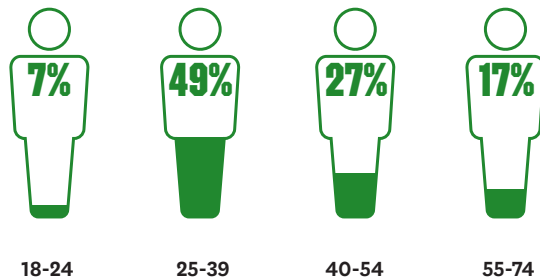
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ACTIVE CONSIDERERS | WHO THEY ARE & WHERE THEY LIVE

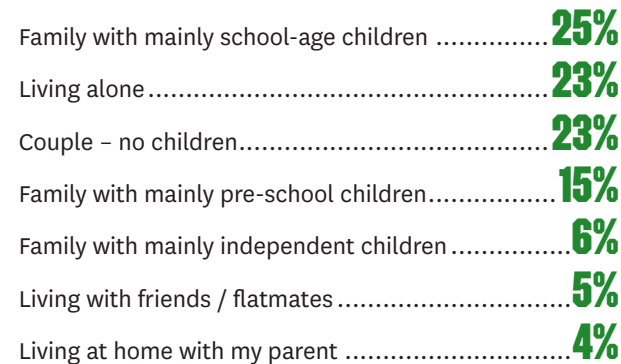


German Active Considerers are predominantly aged 25-54 (76%) and are concentrated in North Rhine-Westphalia, Bavaria, and Berlin. They tend to have higher household incomes and include a mix of families, couples, and independent households.

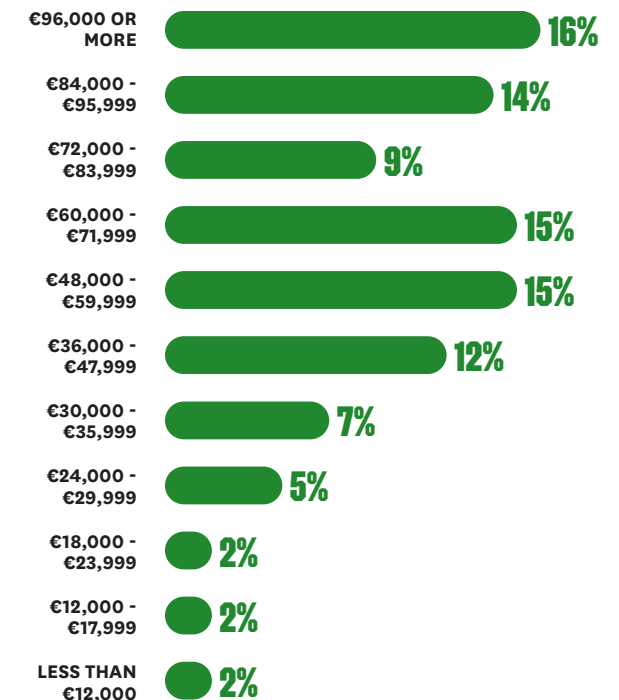
AGE SEGMENT OF ACTIVE CONSIDERERS



FAMILIES, COUPLES, AND SOLO HOUSEHOLDS EACH REPRESENT IMPORTANT SEGMENTS

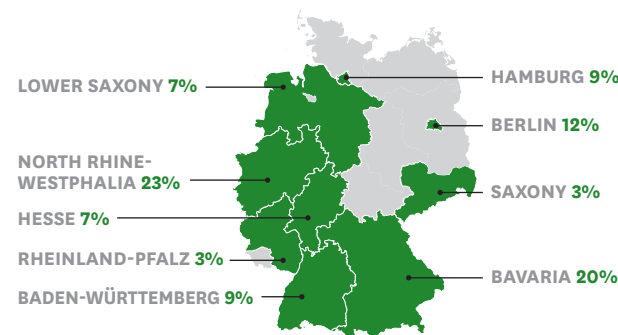


HOUSEHOLD INCOME IS SPREAD WIDELY AMONG ACS



25-54

NORTH RHINE-WESTPHALIA AND BAVARIA ARE KEY SOURCE REGIONS



*Doesn't include those selecting 'prefer not to answer'

Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | HOW THEY SEE NEW ZEALAND



Nature, uniqueness, adventure, and cultural richness shape New Zealand's appeal. The country is also associated with excitement, authenticity, and environmental quality



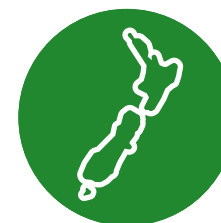
SPECTACULAR NATURAL
LANDSCAPES AND SCENERY

69%



OFFERS A WIDE VARIETY OF OUTDOOR
AND ADVENTURE ACTIVITIES

68%



OFFERS EXPERIENCES THAT YOU
CANNOT GET ANYWHERE ELSE

65%



THINKING ABOUT VISITING MAKES
ME FEEL REALLY EXCITED

65%



OFFERS A WIDE VARIETY
OF TOURIST EXPERIENCES

65%



THE LOCALS ARE FRIENDLY AND
WELCOMING OF ALL VISITORS

64%



OFFERS OPPORTUNITIES TO
EXPERIENCE LOCAL CULTURE

64%



A PLACE YOU CAN ESCAPE
FROM THE ORDINARY

63%



THE ENVIRONMENT THERE IS
CLEAN AND UNPOLLUTED

63%

Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | REASONS TO VISIT NEW ZEALAND



They are motivated by opportunities to connect with nature, experience beautiful scenery, discover new places, seek adventure, and escape everyday routines. Relaxation and cultural interaction further contribute to New Zealand's appeal



Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY WOULD LIKE TO SEE & DO IN NEW ZEALAND



German Active Considerers are interested in a broad range of experiences, including beaches, local cuisine, cities, heritage attractions, geothermal sites, alpine environments, and waterways. The appeal combines nature, culture, and exploration



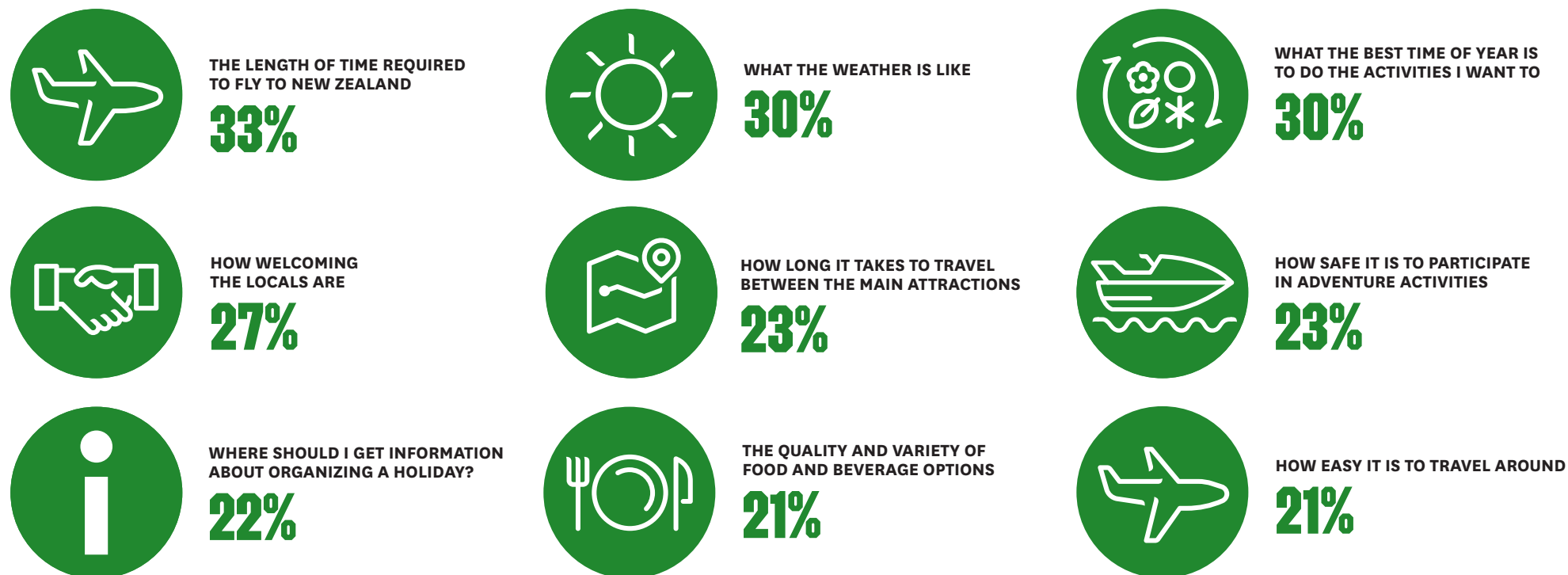
Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY NEED TO KNOW BEFORE VISITING NEW ZEALAND



Germans considering a trip to New Zealand seek practical information about flight times, weather conditions, the best time to visit, local hospitality, and travel between attractions



Source: Active Considerer Monitor data six-month period ending May 2026

NGA MIHI