

GERMANY

Visitors & Market Insights

July 2025



**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 people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Statistics New Zealand's International Visitor Arrivals and MBIE's International Visitor Survey.

Mix of Markets

The mix of markets covered in our Market Snapshots include:

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



VISITOR INSIGHTS

Latest Germany market arrival insights
International Visitor Survey

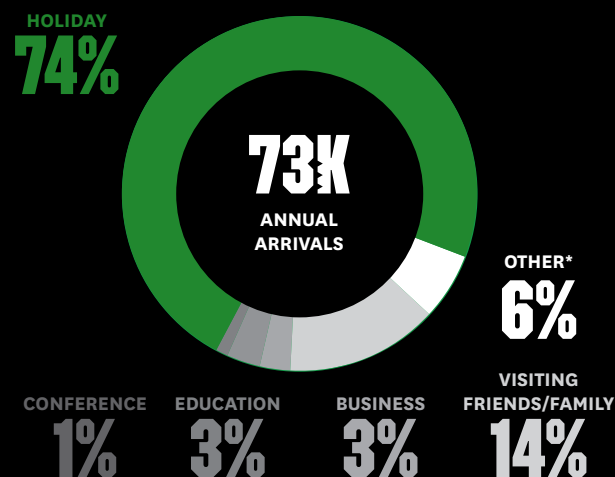
GERMANY

TRAVELLER INSIGHTS

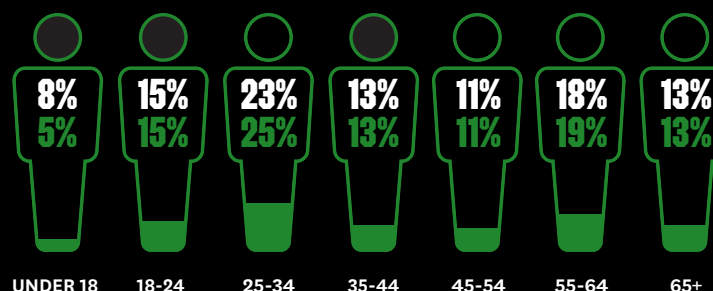


Last year, 73,000 Germans visited New Zealand, with 74% arriving for holidays. Half came during summer, and holidaymakers stayed an average of 16 days. The gender split was even, and 38% were aged 55 or older. Most stayed 15-21 days, highlighting strong seasonal and long-stay travel preferences.

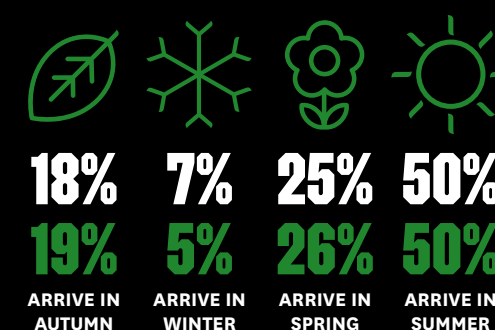
PURPOSE OF VISIT



38% OF HOLIDAYMAKERS ARE 25-44 YEARS



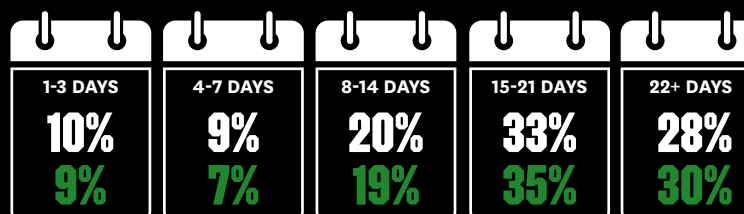
HALF VISIT IN SUMMER



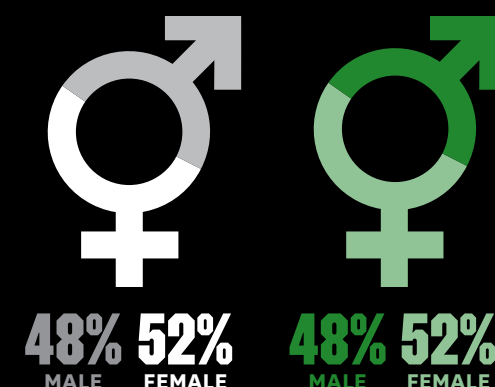
AVERAGE LENGTH OF STAY



LENGTH OF STAY (DAYS)



GENDER OF VISITORS



ALL VISITORS HOLIDAY VISITORS

Source: Statistics NZ international Visitor Arrivals – Year ending May 2025

*Seasons: Winter 24, Spring 24, Summer 24/25, Autumn 25

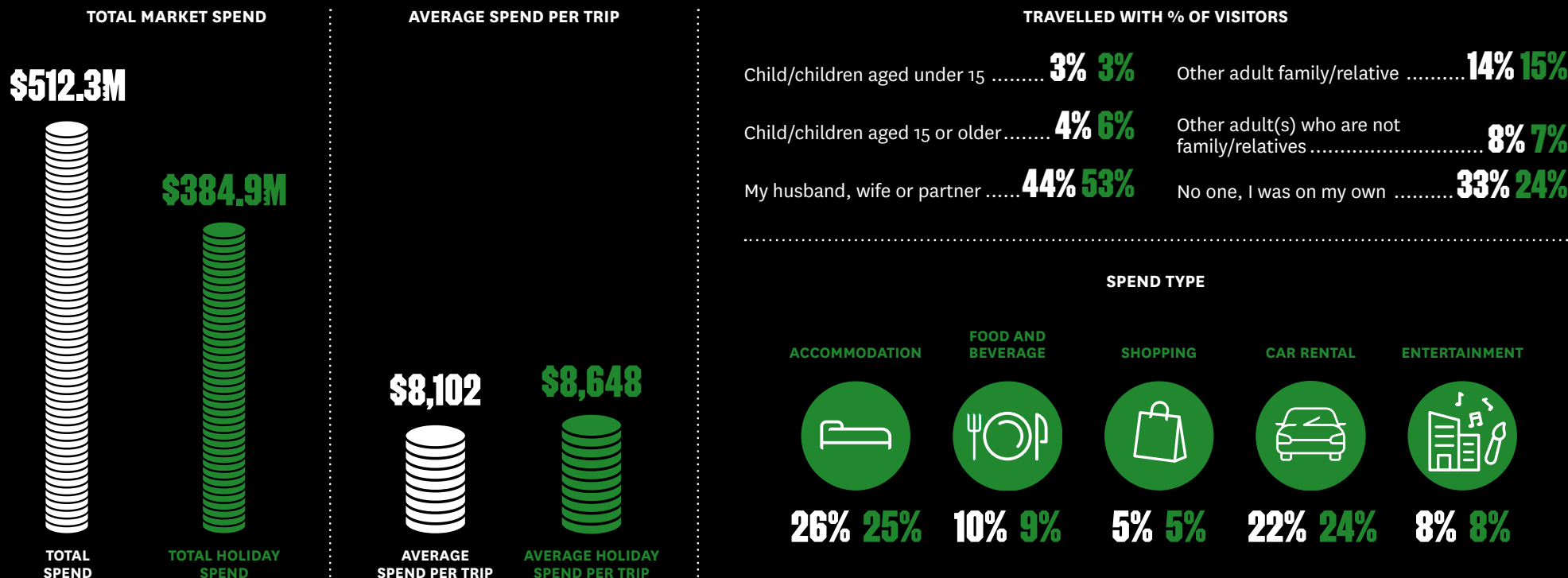
Due to rounding, the sum of individual group percentages may not total exactly 100%

GERMANY

VISITOR SNAPSHOT



German visitors spent \$512.3 million in NZ, with \$384.9 million by holidaymakers. The average spend per trip was \$8,102, rising to \$8,648 for holidays. One quarter of spending was on accommodation, and visitors were more likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

Source: MBIE, International Visitor Survey. Year ending March 2025

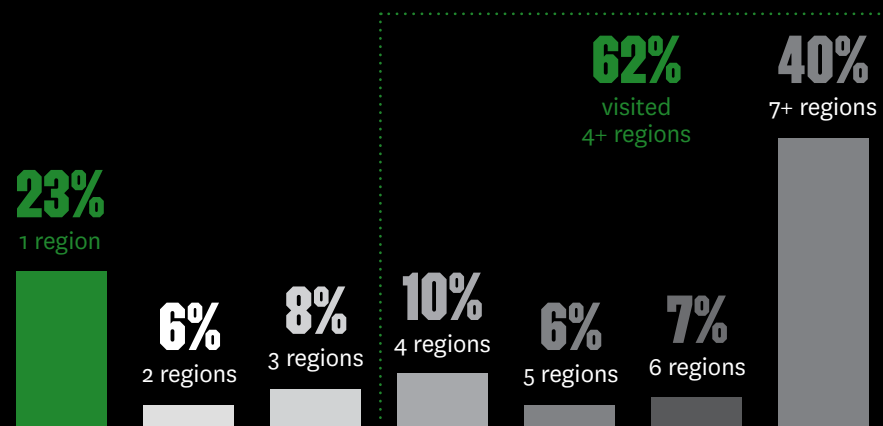
GERMANY

HOLIDAY TRAVELLER INSIGHTS

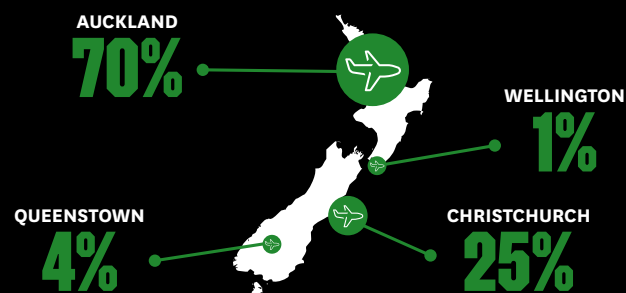


Most German tourists visited the North Island (88%), while 68% explored the South Island, with 55% visiting both. Among them, 62% visited four or more regions. Auckland was the most popular destination, followed by Christchurch and Queenstown-Lakes District.

NUMBER OF REGIONS VISITED PER VISIT



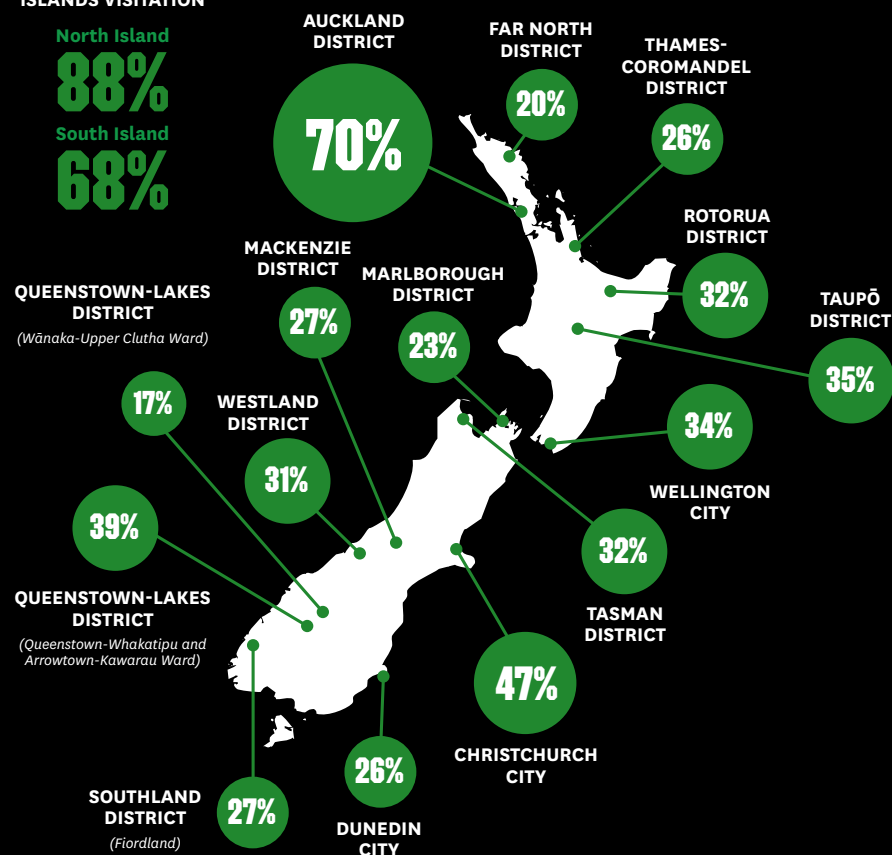
ARRIVAL AIRPORT



REGIONS VISITED PER VISIT

ISLANDS VISITATION

North Island
88%
South Island
68%



Source: MBIE, International Visitor Survey | Year ending March 2025 | Holiday Visitors
NZ Stats - Holiday Arrivals (Port of Arrival)

GERMANY

HOLIDAY TRAVELLER INSIGHTS



The most common activities or attractions visited by Germans were walks, hikes, or tramps followed by natural attractions like mountains, lakes, or forests and beaches. Cultural and geothermal experiences were also popular, with over half visiting geothermal parks, hot pools, glaciers, or places significant to Māori.

TOP ACTIVITIES ENJOYED BY GERMANS IN NEW ZEALAND



91%

Walk, hike, trek or tramp



88%

Other natural attractions



84%

A beach



82%

Visiting a national park



68%

A geothermal park



62%

Museum or art gallery

GERMANY

HOLIDAY TRAVELLER INSIGHTS



Most visitors from Germany opted for hotels or online-booked private accommodations. Paid camping grounds, free camping and Department of Conservation sites were also popular. Over 1 in 3 use the ferry to travel between the North and South Island and rental cars and taxis/shuttles were popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



45%

Hotel



43%

House/apartment booked online (AirBnb etc)



36%

Paid camping ground/holiday park



30%

Free camping



24%

Camping at a National Park / Department of Conservation



24%

Motel, motor inn or serviced apartment



17%

Backpackers



15%

Youth Hostel, YMCA, YWCA



15%

Bed and Breakfast

MODES OF TRANSPORT



37%

The ferry between the North Island and the South Island



32%

Rental car



29%

Taxi/shuttle



28%

Local bus service



21%

Uber or other app based



21%

Plane (within New Zealand)



19%

Rental campervan/motor-home



16%

Other boat or ship



15%

Bus service between towns/cities

OUR FUTURE TRAVELLERS

Active Considerers

They are Tourism New Zealand's marketing audiences. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

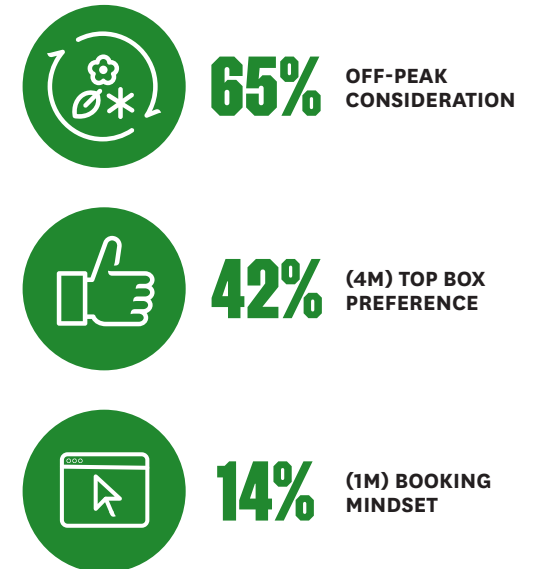
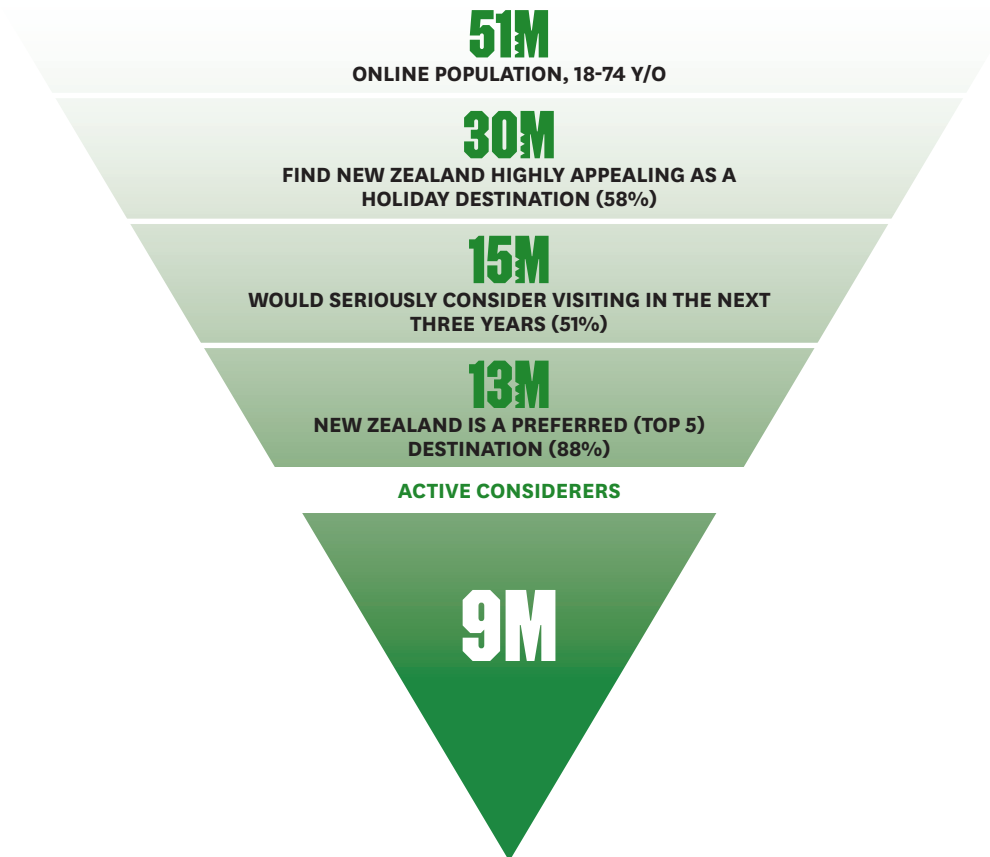


GERMANY

ACTIVE CONSIDERERS



New Zealand appeals to 58% of Germany's 18–74 online population — that's 30 million people. Of these, 15 million would seriously consider visiting, 13 million rank it in their top five destinations, and 9 million are willing to spend a realistic budget — representing a sizeable pool of Active Considerers.



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Germans indicate they are willing to spend at least € 2000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

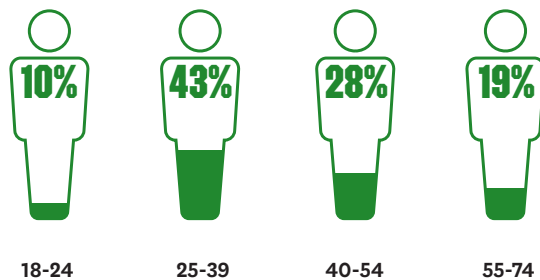
GERMANY

ACTIVE CONSIDERERS

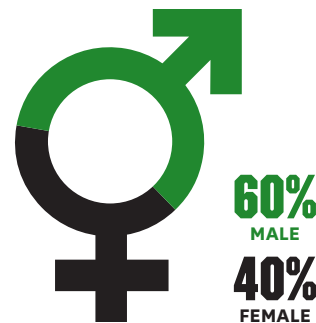


Active Considerers skew more towards those ages 25–39 years, with over 40% living in Bavaria and North Rhine-Westphalia and over 40% have a monthly household income of over €5,000.

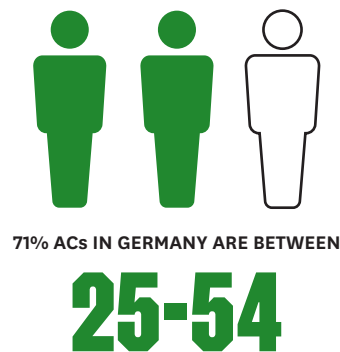
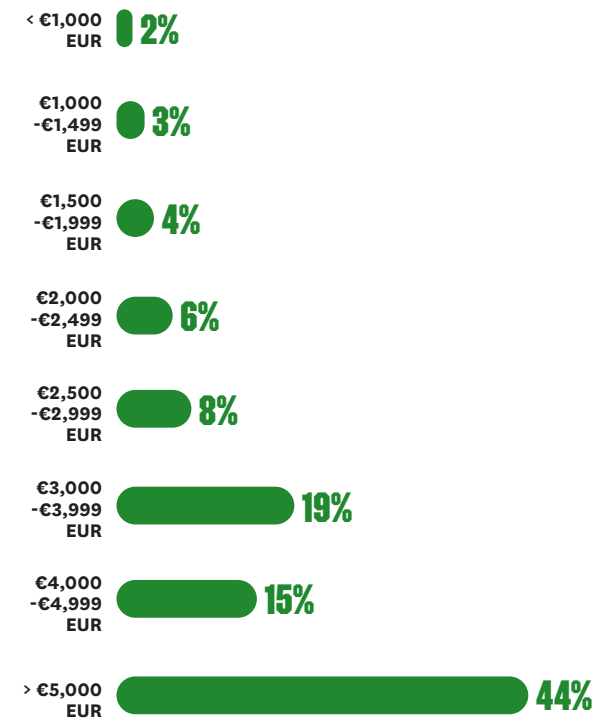
AGE SEGMENT OF ACTIVE CONSIDERERS



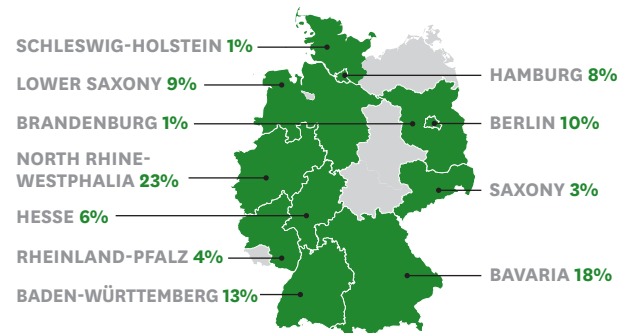
GENDER OF ACS



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



REGIONAL SPREAD



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

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Germans indicate they are willing to spend at least € 2000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

GERMANY

ACTIVE CONSIDERERS



New Zealand is strongly associated with its spectacular natural scenery and unique experiences, with safety perceptions improving the most year-on-year (+2.4%).

BRAND ASSOCIATIONS



SPECTACULAR NATURAL
LANDSCAPES AND SCENERY

77%



OFFERS EXPERIENCES THAT YOU
CANNOT GET ANYWHERE ELSE

72%



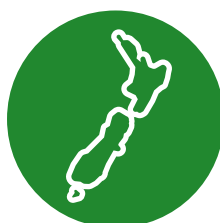
THINKING ABOUT VISITING MAKES
ME FEEL REALLY EXCITED

72%



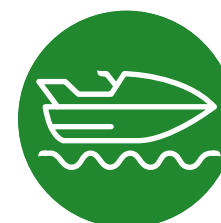
I WOULD FEEL SAFE TRAVELLING
AROUND THIS DESTINATION

71%



A PLACE YOU CAN ESCAPE
FROM THE ORDINARY

70%



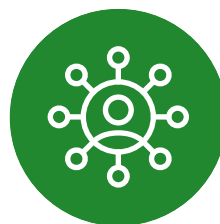
OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES

70%



OFFERS OPPORTUNITIES TO
EXPERIENCE LOCAL CULTURE

70%



OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES

69%



THE LOCALS ARE FRIENDLY AND
WELCOMING

69%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Germans indicate they are willing to spend at least € 2000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

GERMANY

ACTIVE CONSIDERERS



The top reasons German Active Considerers want to visit New Zealand are to experience its beautiful landscapes and to get in touch with nature. While those seeking relaxation have seen a slight increase year-on-year, interest in cultural interaction, learning, and adventure has slightly declined.

REASONS TO VISIT NEW ZEALAND



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Germans indicate they are willing to spend at least € 2000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

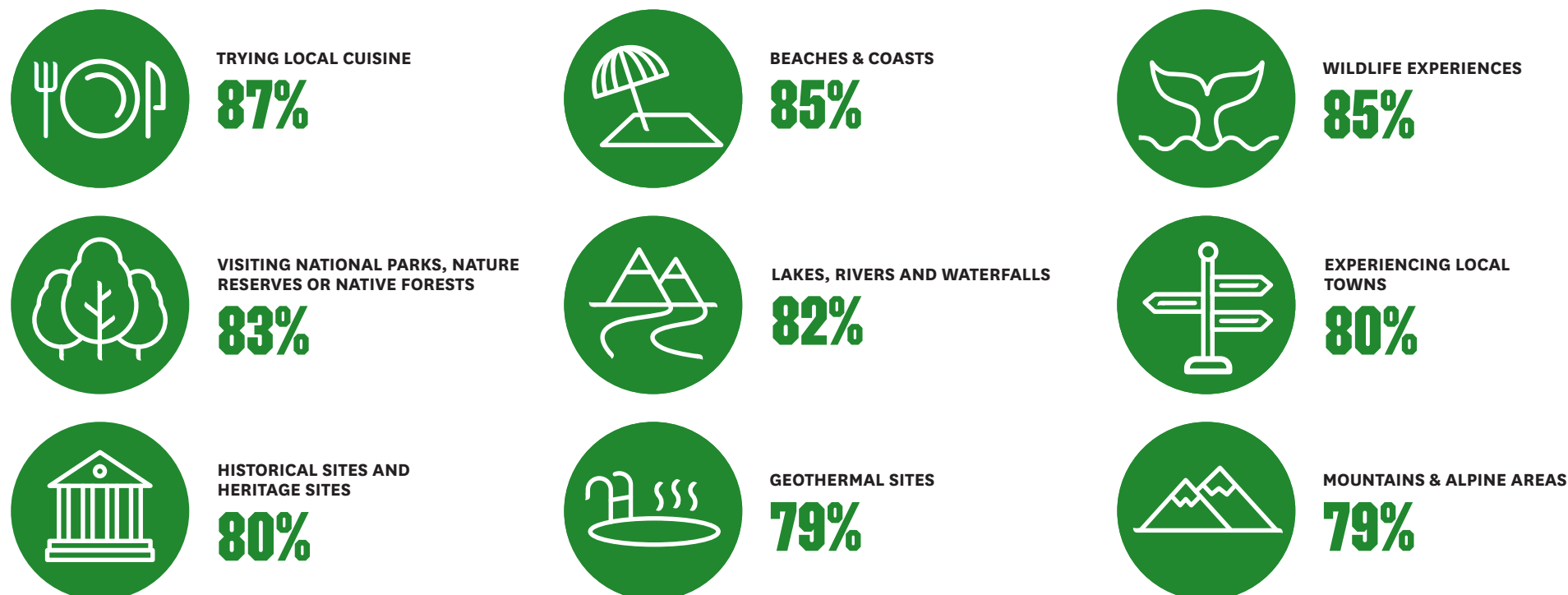
GERMANY

ACTIVE CONSIDERERS



Most travellers are interested in experiencing local cuisine, wildlife, and coastal areas, with over 85% expressing interest in these activities. Nature-based and cultural attractions like national parks, lakes, towns, and heritage sites also draw strong appeal.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Germans indicate they are willing to spend at least € 2000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

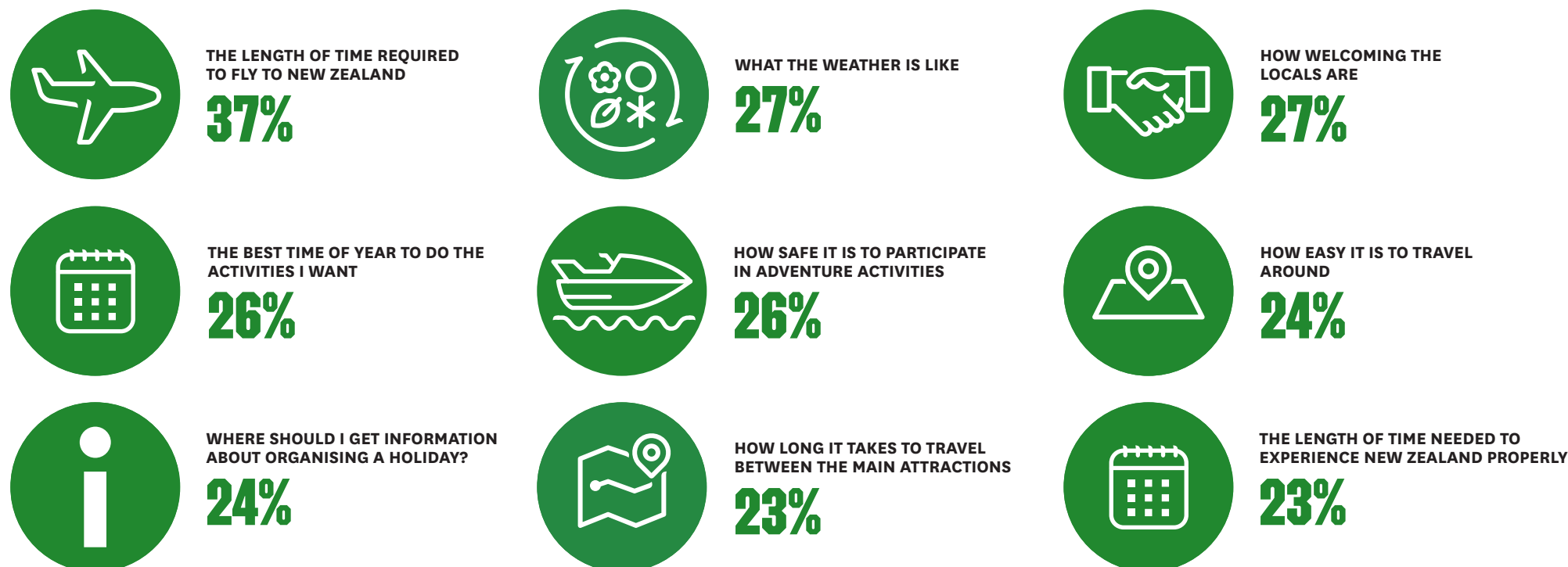
GERMANY

ACTIVE CONSIDERERS



German travellers considering New Zealand for their next holiday are most likely to be concerned about the long flight time, unpredictable weather, and how welcoming the locals are. Other notable concerns include the time of year for activities, safety of adventure sports, ease of travel, and where to find information about organising a holiday.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Germans indicate they are willing to spend at least € 2000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

NGA MIHI