GERMANY

Market information about our Visitors and our Active Considerers
Past Visitor Research
This is information collected about those who have visited New Zealand. This is the source for the visitor snapshot infographics. It is primarily sourced from Statistics New Zealand (International Travel and Migration), and the Ministry of Business, Innovation and Employment (International Visitor Survey).

Throughout this document, any pages that refer to past visitor research will have a black background like this one.

Past Visitors
Historic View

Total Arrivals
YE September 2017

Past Visitor Research
The German market is quite unique. German visitors tend to be younger, they stay for longer, visit on average 7-8 regions and tend to stay in lower cost accommodation. Germans love getting into our National Parks to do walking and hiking.

German Market

Active Considerers
Future View

Active Considerer Research
An Active Considerer is someone who is considering coming to New Zealand for their next holiday, and New Zealand is one of their top five destinations they would most like to visit. Tourism New Zealand commissions ongoing research (Kantar TNS), to understand who these people are, and what their motivations and barriers are; this research is the key information source for understanding our future visitors.

Throughout this document, any pages that refer to Active Considerer research will have a white background like this one.
**GERMANY VISITOR SNAPSHOT**

Germany is our fifth largest market, and it brings longer staying visitors who visit a large number of regions.

**AVERAGE LENGTH OF STAY**

- **Holiday Stay Days**: 3.4m
- **Total Stay Days**: 4.9m

**PURPOSE OF VISIT**

- **Holiday Visitors**: 77K
- **Total Visitors**: 104K

**AVERAGE SPEND PER VISITOR**

- **Holiday**: $5,580
- **Total**: $5,277
- **Total Market Contribution Spend**: $406m
- **First Time Visitors**: 82%
- **Repeat Visitors**: 18%

**SOURCES**: Statistics New Zealand International Travel and Migration; MBIE International Visitor Forecasts; MBIE International Visitor Survey; MBIE Regional Tourism Estimates

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**VISITOR GROWTH TREND**

Germany arrivals have been in a period of sustained growth and the long term outlook remains robust.

**GERMANY ARRIVALS (000)**

- **Holiday Arrivals**: Total +13% on LY
- **Total Arrivals**: Total +10% on LY

**2017-2023 Germany Arrivals Forecast to Grow 5.8% p.a. to 144k**
Germany has a significant Youth segment but Independent Professionals are the largest holiday segment.

**AGE PROFILE OF HOLIDAY VISITORS**

- **25%** Youth
  - Ages 18-24
- **51%** Independent Professionals
  - Ages 25-54
- **19%** Active Boomers
  - Ages 55-74

**VISITOR ROUTES**

With no direct services, German visitors tend to arrive via Australia, Singapore or the gulf ports of Dubai and Doha.

- **19%** of German holiday visitors claimed to have visited Australia prior to arriving in New Zealand.
- 44% arrive via an Australian port
- 15% via Singapore
- 12% via Gulf
- 8% via Hong Kong
- 4% via Thailand
- 3% via China
GERMANY

VISITOR TRAVEL SEASONS

Half of German holiday visitors come to New Zealand in the summer months.

GERMANS TEND TO ARRIVE IN SUMMER, ESCAPING THEIR WINTER.

ARRIVE IN SUMMER 49%
ARRIVE IN AUTUMN 20%
ARRIVE IN WINTER 6%
ARRIVE IN SPRING 25%

YOUTH ARRIVALS ARE MORE SPREAD OUT ACROSS SHOULDER SEASONS AND SUMMER, BECAUSE THEY TEND TO STAY FOR LONGER

35% 23% 11% 32%

VISITOR DESTINATIONS

Germans visit more regions (seven to eight on average) than any other visitors.
Top activities for German holiday visitors.

Top-visited destinations:
- Abel Tasman: 56%
- Milford: 53%
- Tongariro: 58%
- Paparoa: 55%
- Mt Aspiring: 50%

Most popular activities:
- Walk/hike/tramp: 98%
- National park: 94%
- Beach: 93%
- Scenic boat trip: 68%
- Gland: 67%

GERMAN HOLIDAY VISITORS LOVE OUR NATIONAL PARKS VISITING FIVE ON AVERAGE

Visiting many regions, Germans use a wide variety of accommodation and transport options.

Accommodation stayed in:
- Camping: 54%
- Backpacker/hostel: 47%
- Hotel: 38%
- Motel/motor inn/serviced apartment: 28%
- Family and friends: 22%
- Farm/home stay: 18%
- Free camping: 16%
- Bed and breakfast: 9%
- Luxury: 4%

Germans have the highest use of campervans of our key markets.
**GERMANY VISITOR SATISFACTION**

Germans have a very positive experience while in New Zealand. There remains an opportunity to improve experience for the minority whose expectations are not met.

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**Satisfaction**

- **9/10**

**Meeting Expectations**

- **90%** Expectations of New Zealand experience met or exceeded
- **40%** Exceeded
- **50%** Met
- **8%** Worse than
- **2%** Not sure

**Net Promoter Score**

- **71%** Promoters
- **19%** Passives
- **5%** Detractors

**Active Considerers**

Active Considerers are what we call our target audience. These people are aged 18-74, they are aware of New Zealand and it is a preferred destination to visit for a holiday in the next three years. They also indicate that they are prepared to spend €2,000 per person on their holiday.
**Active Considerers from Germany**
want to come to New Zealand to get in touch with nature, and interact with people of different cultures and lifestyles. To help our visitors achieve this, we need to communicate the length of time required to fly to New Zealand as well as the length of time to experience New Zealand properly.

**What do active considerers want from a holiday in New Zealand?**

- **68%** want to get in touch with nature.
- **64%** want to interact with people of different cultures and lifestyles.
- **64%** want to broaden my mind.
- **58%** want to learn and explore new things.
- **49%** want to be excited.

**What do they need more information about?**

- **38%** want to know more about the length of time required to fly to New Zealand.
- **38%** want to know more about the length of time they need to experience New Zealand properly.
- **21%** want to know how welcoming the locals are to tourists from my country.
For German Active Considerers, New Zealand is in the competitive set including destinations such as Australia, USA, Canada, the Caribbean and South Africa. Our strengths are our landscapes and scenery as well as our clean and unpolluted environment.

**WHAT GERMANS KNOW US FOR**

- Clean & unpolluted
- Landscapes & scenery
- Safe Destination
- Seeing lots without travelling far

**MESSAGES WE NEED TO COMMUNICATE MORE**

- Range of adventure
- Easy to travel around
- Friendly people
- Unique experiences
Germain Activ Considerer Independent Professional Profile

Independent Professionals are people aged 25-54 years old. They are our largest segment within our Active Considerer target audience, making up 68% of our target audience.

What do Independent Professionals want from a holiday in New Zealand?

- To get in touch with nature: 65%
- To interact with people of a different culture or lifestyle: 61%
- To learn and explore new things: 61%
- To feel excited: 55%
- TO FEEL EXCITED: 53%

What does their holiday look like?

- Self drive exploring: 52%
- Staying for 2 weeks: 65%
- Travelling with partner or spouse: 44%
- Experience seeking: 44%
- Staying for 4+ weeks: 25%
- Travelling with friends: 25%

What do they need more information about?

- How safe it is from crime: 21%
- The length of time needed to explore New Zealand properly: 25%
- The length of time required to fly to New Zealand: 38%
- How welcoming the locals are to tourists from my country: 18%

Gender skews male: 58% male, 42% female

Independent Professionals are more likely to be tertiary qualified:

- University degree: 22%
- Tertiary qualification: 13%
- Non-tertiary qualification: 65%

Univerrity degree

Independent Professionals are more likely to have higher household income:

- > €48K: 15% AC, 9% NON-AC
- €30K - €48K: 35% AC, 28% NON-AC
- €15K - €30K: 38% AC, 40% NON-AC
- < €15K: 12% AC, 24% NON-AC
Active Boomers are people aged 55-74 years old. They are the second largest segment of our Active Considerer target audience, making up 22% of our target audience.

Gender Skews Male

Active Boomers are more likely to be Tertiary Qualified

University Degree

20%

12%

58%
42%

Active Boomers are more likely to have higher household income

> €48K

AC

17%

NON

8%

€30K - €48K

AC

36%

NON

29%

€15K - €30K

AC

34%

NON

41%

< €15K

AC

15%

NON

20%

What do Active Boomers want from a holiday in New Zealand?

- To interact with people of a different culture or lifestyle: 76%
- To get in touch with nature: 76%
- To broaden my mind: 70%
- To learn and explore new things: 64%
- To feel refreshed: 50%

What does their holiday look like?

- Self Drive Exploring: 63%
- Staying for 2 weeks: 15%
- Travelling with partner or spouse: 15%
- Experience Seeking: 15%
- Staying for 4+ weeks: 15%
- Travelling with friends: 15%

What do they need more information about?

- How physically fit I need to be: 30%
- The length of time required to fly to New Zealand: 41%
- What / where the recommended things to see and do are: 24%

How well suited New Zealand is to people of my age group: 27%