

INTERNATIONAL MARKET PROFILE GERMANY



Market Overview

Currently Germany is South Australia's fourth largest inbound market.

70% of German visitors to South Australia are first time visitors to Australia, indicating that South Australia's product offering has strong appeal.

South Australia's nature, wildlife and landscapes are the most appealing features of the state and self-drive holidays along the Adelaide-Melbourne Touring Route and Explorer's Way are a popular way of travelling.

Many Germans will spend some time in Adelaide and the surrounding food and wine regions although this may not be the main purpose for their visit to South Australia.

Youth travellers and those visiting Australia on a Working Holiday Visa have a high length of stay and dispersal to the regions.

Air Access

Airlines which provide direct access to Adelaide with one stop over include Singapore Airlines, Cathay Pacific and Emirates.

Key Themes

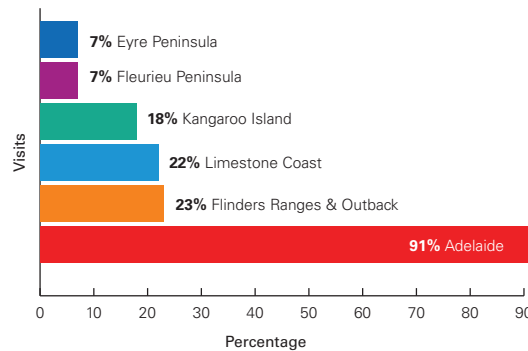
Soft adventure; food and wine; outback; coastal; nature and wildlife; journeys.

Fast Facts and Figures

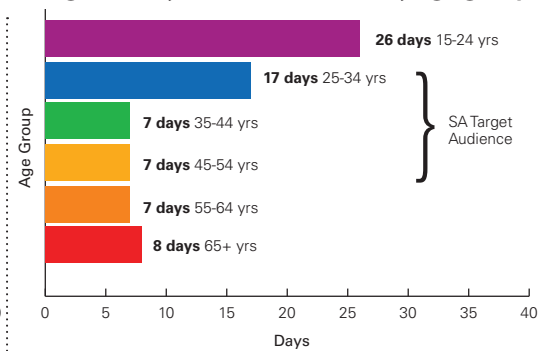
Data is based on a 3 year average for the years ending June 2012 to June 2014 for all purpose visitors.

GERMANY					
South Australia	Holiday	VFR	Business	Other	Total
Visits	23,000	3,600	2,400	1,900	28,000
Nights	220,000	54,000	41,000	112,000	428,000
Average Length of Stay (nights)	10	15	17	59	15
Expenditure					\$31,000,000

Key South Australian Overnight Destinations



Length of stay in South Australia by age group

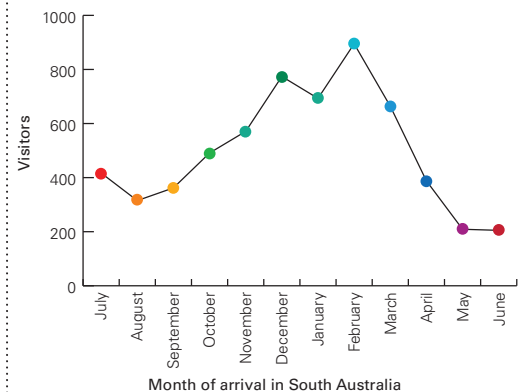


Appealing Experiences

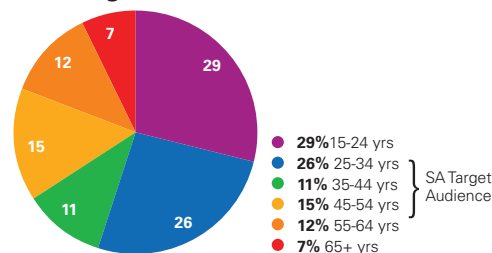
- Adelaide and surrounds, Kangaroo Island and Eyre Peninsula offer Australian wildlife in the wild, aquatic wildlife and natural landscapes.
- Authentic outback and wilderness experiences in the Flinders Ranges.
- Self-drive journeys of the Southern Ocean Drive (Melbourne to Adelaide), Explorers Way (Flinders Ranges), Epicurean Way (food and wine) and hiking trails.

Average length of stay is influenced by longer staying education and VFR sectors.

Seasonality



Visitor Age Profile



Target Market Profile

The primary experience seeker market segment are adults aged 30-59, are experienced travellers looking for quality and unique experiences. The secondary youth market segment are aged 18-29 who plan to backpack or take a working holiday in Australia.



Government of South Australia

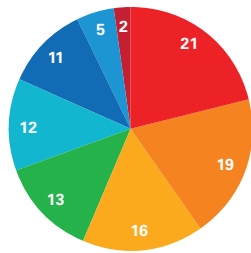
South Australian Tourism Commission

Market Insights

- Traditional trade partners are still core for the German outbound travel market with over 59% of all travel bookings in Germany being made through a travel agent.
- Travellers remain protected whilst travelling if they book through a tour operator as the industry is protected by strict travel protection laws. Therefore the South Australian Tourism Commission (SATC) divides resources between working strongly with the travel trade and also looking at consumer engagement through public relations and promotions to drive awareness and demand.
- As European travel law is very strict and you must provide exactly what is described in any brochures. If there are any changes to your product you must advise the wholesaler as soon as possible.
- Consumers perceive Australia to be an expensive destination compared to other long haul destinations.
- The German market has a big focus on loyalty and relationships.

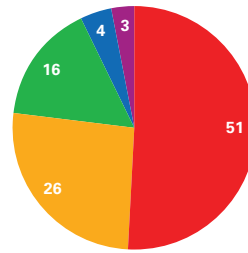
Social Media

Facebook: <https://www.facebook.com/suedaustralien>



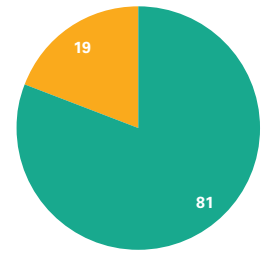
Accommodation used (visitor nights)

- 21% Home of friend/relative
- 19% Backpacker/hostel
- 16% Homestay
- 13% Rented house/apartment/unit/flat
- 12% Hotel/resort/motel/motor inn
- 11% Caravan
- 5% Other non-commercial property
- 2% Other



Travel party description

- 51% Unaccompanied
- 26% Adult couple
- 16% With Friends/relatives
- 4% Family Group
- 3% Business



Package Tours

- 81% Non Package Tour
- 19% Package Tour

This data includes Education and VFR purpose sectors.

Key Distribution Partners

Key Wholesale Partners	Inbound Representative Company in Australia
DERTOUR	Terra Nova
FTI	AOT
Meier's Weltreisen	Terra Nova
BOTG Members Germany	Go Way
Explorer Fernreisen	ATS Pacific
Boomerang Reisen	Australia One
TUI Germany / Airtours	APTC
Gebeco / Dr. Tigges	APTC
Kiwi Tours	Terra Nova
Studiosus Reisen	Southern Walk
Art of Travel	Works mainly with products direct
Australia Tours	ATS Pacific
STA Travel	None
Thomas Cook	None
Pacific Travel House	Australia One
Windrose Fernreisen	Australia One
Fairflight	AOT

Top Travel Websites		
HolidayCheckNetwork	TUI	Weg.de
Ab-in-den-urlaub.de	DER Touristik	booking.com
TripAdvisor	Expedia.de	swoodoo.com
fluege.de	Opodo	Trivago

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Source: International Visitor Survey, Tourism Research Australia, Canberra | Department of Immigration and Citizenship (DIAC) | VFR = Visiting Friends and Relatives
Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia.

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