

INTERNATIONAL MARKET PROFILE

GERMANY

MARKET OVERVIEW

- ▶ Currently, Germany is South Australia's fifth largest inbound market.
- ▶ Over 63% 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 for German visitors.
- ▶ Self-drive holidays along the Adelaide to Melbourne Touring Route and Explorers Way are a popular way to travel for this market and allows them to disperse well around regional South Australia.
- ▶ 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.

FAST FACTS & FIGURES

Data is based on a 3 year annual average for the years ending Dec 2016 – Dec 2018 for all purpose visitors.

GERMANY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	24,000	3,000	1,000	1,000	29,000
Visits (AUS)	148,000	63,000	19,000	47,000	197,000
Nights (SA)	250,000	51,000	14,000	146,000	461,000
Nights (AUS)	5,963,000	1,046,000	217,000	1,567,000	8,792,000
ALOS - Nights (SA)	10	17	14	146	16
ALOS - Nights (AUS)	40	17	11	33	45
EXPENDITURE					\$34,000,000

APPEALING EXPERIENCES

- ▶ Adelaide and surrounds, Kangaroo Island and Eyre Peninsula's diverse and abundant natural landscapes and uniquely Australian wildlife and aquatic experiences.
- ▶ Authentic outback and wilderness experiences of the Flinders Ranges & Outback.
- ▶ Self-drive journeys, including Southern Ocean Drive (Melbourne to Adelaide), Explorers Way (Adelaide to Darwin), Epicurean Way (food & wine) and hiking trails.

TARGET MARKET PROFILE

- ▶ The primary experience seeker market, who are experienced travellers, have a preference for Australia and looking for quality and unique experiences.
- ▶ The secondary youth market aged 18-29 who plan to backpack or take a working holiday in Australia with a Working Holiday Visa.

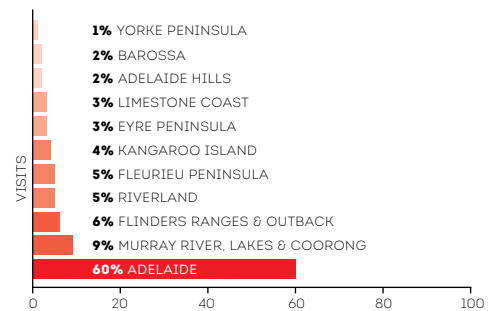
KEY THEMES

- ▶ Nature & wildlife
- ▶ Outback
- ▶ Coastal
- ▶ Journeys
- ▶ Soft adventure
- ▶ Food & wine

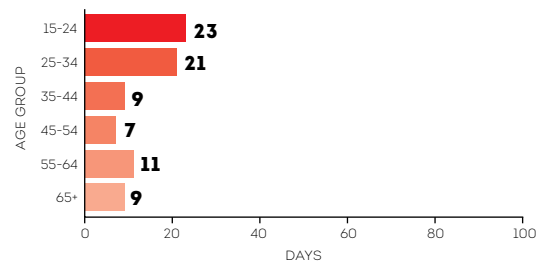
AIR ACCESS

- ▶ Airlines providing direct access to Adelaide from Germany with one stopover include Singapore Airlines, Cathay Pacific, Emirates, China Southern Airlines and Qatar Airways.

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

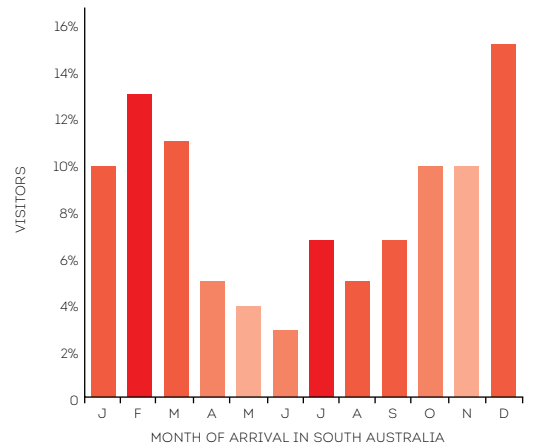


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

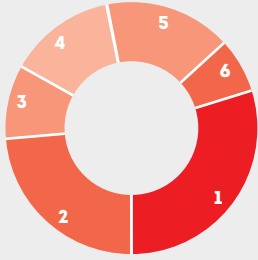
SEASONALITY



INTERNATIONAL MARKET PROFILE

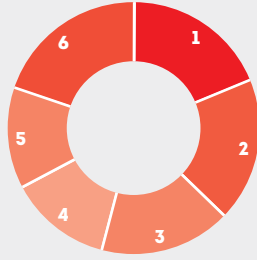
GERMANY

VISITOR AGE PROFILE



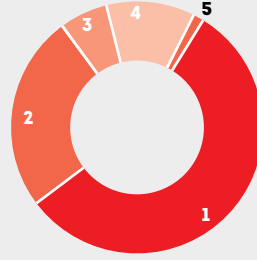
1 15-24 29%
2 25-34 23%
3 35-44 10%
4 45-54 14%
5 55-64 17%
6 65+ 7%

ACCOMMODATION USED



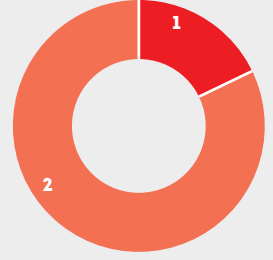
1 Homestay 19%
2 Rented house/apartment/unit/flat 18%
3 Backpacker/hostel 17%
4 Caravan/camping 13%
5 Home of friend/relative 13%
6 Other 20%

TRAVEL PARTY DESCRIPTIONS



1 Unaccompanied 56%
2 Adult couple 25%
3 Family group 6%
4 With friends/relatives travelling together 11%
5 Business 1%

PACKAGE TOURS



1 Package tour 18%
2 Non-package tour 82%

MARKET INSIGHTS

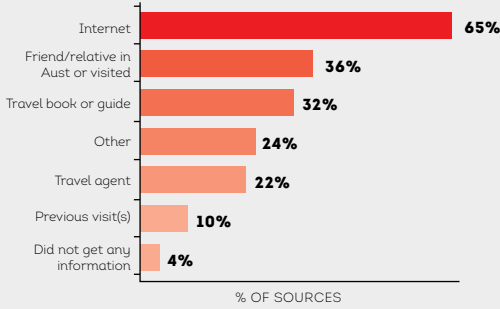
- ▶ There are two major distribution channels for Australian product in the German market:
 - ▶ Wholesalers who sell their products through travel agencies (mainly chains, franchise systems and affiliations - very few independents)
 - ▶ Direct sellers who use their own retail offices and partner agencies as their distribution channel
- ▶ Most product is contracted through Inbound Tour Operators in Australia although some deal directly with tourism product.
- ▶ Bookings through traditional retail agencies remain very strong for long haul travellers aged over 40 years. However, there has been an increase in long haul online bookings for airfares and accommodation by travellers aged under 30 years, particularly those travelling for extended periods of time.
- ▶ There are approximately 50 to 60 tour operators selling Australia in Germany, distributing product via wholesale and retail agencies. The major traditional wholesalers selling Australia include DERTOUR, FTI Touristik, Meier's Weltreisen and TUI.
- ▶ Direct sellers are an important feature of the German market, producing a healthy share of the outbound traveller market to Australia. Key direct sellers include Best of Travel Group (BOTG - and its members), Boomerang Reisen, Explorer Fernreisen and STA Travel. In addition, some retail agencies specialise in selling Australia directly.

- ▶ Key German trade partners are decentralised with clusters around the country as follows:
 - ▶ Frankfurt
 - ▶ Munich/Stuttgart area
 - ▶ Hamburg/Hannover
 - ▶ Cologne/Bonn/Düsseldorf
- ▶ Online bookings are continuing to increase with 68% identifying their preferred method of booking their holiday is online (this is not specific to Australian holidays though).
- ▶ Travellers remain protected during their travels 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 with travel trade and looking at consumer engagement through public relations and promotions to drive awareness and demand.
- ▶ 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.

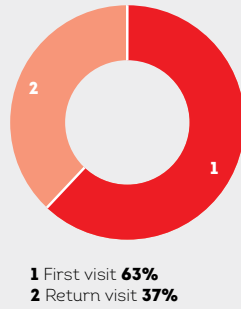
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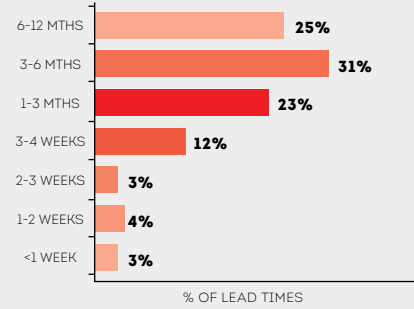
INFORMATION SOURCES



FIRST OR RETURN VISIT



BOOKING LEAD TIMES



KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
DERTOUR / MEEIR'S WELTREISEN / KUONI	TERRA NOVA & PACIFIC DESTINATIONS
FTI TOURISTIK	AOT
BOTG MEMBERS GERMANY	GOWAY
EXPLORER FERNREISEN	ATS PACIFIC & AOT
BOOMERANG REISEN	AUSTRALIA ONE
STA TRAVEL	AOT
GEBECO / DR. TIGGES	APTC
THOMAS COOK / KIWI TOURS	GROUP: TERRA NOVA FIT: AUSTRALIA ONE
ART OF TRAVEL	APTC
AUSTRALIA TOURS	APTC
PACIFIC TRAVEL HOUSE	AOT & ATS PACIFIC
WINDROSE FERNREISEN	APTC
TUI	APTC
TRAVEL ESSENCE	WORKS MAINLY WITH PRODUCTS DIRECT
HM TOURISTIK	AOT

CONTRACTING & BROCHURE TIMES

Contracting and production in August – September.
Brochure validity 1 April – 31 March.

TOP TRAVEL WEBSITES

HOLIDAYCHECK.DE	OPODO.DE
EXPEDIA.DE	WEG.DE
SONNEKLAR.TV	LASTMINUTE.DE
DER.COM	FLUEGE.DE
TRIPADVISOR.COM	TRAVELZOO.COM

SOCIAL MEDIA

 Find our Facebook page at [SeeSouthAustralia](#)

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Source: International Visitor Survey Dec 16, Dec 17 & Dec 18 conducted by Tourism Research Australia. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2016 to Dec 2018. Totals may not add to 100% due to rounding. np = not published due to small sample size. VFR = Visiting Friends and Relatives. ALOS = Average Length Of Stay (Nights). Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia. Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete or suitable for the purposes for which you wish to use it. By using this information you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information. Produced by the South Australian Tourism Commission April 2019.