

GERMANY

INTERNATIONAL MARKET UPDATE 2025

MARKET OVERVIEW

- Germany is South Australia's 5th largest inbound market and is ranked 14th for expenditure as of June 2025.
- German travellers tend to book their long-haul holidays using traditional retail agents for reasons of personal service, comfort, and safety.
- Key demand driving experiences include diverse natural landscapes, uniquely Australian wildlife experiences, authentic outback and wilderness experiences, and self-drive journeys, such as the Explorers Way.
- Typical peak travel periods are the European winter season from September to April.
- Germans are known to have a high rate of dispersal, visiting multiple regions per trip.
- 47% of German visitors to South Australia have been to Australia before.*
- 60% of visits are for the purpose of Holiday, 29% for Visiting Friends and Relatives (VFR).*



FAST FACTS & FIGURES


Data is an annual average over 2 years ending June 2024-June 2025

GERMANY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	18,000	5,000	1,000	1,000	24,000
VISITS (AUS)	114,000	54,000	16,000	37,000	157,000
NIGHTS (SA)	148,000	90,000	8,000	80,000	326,000
NIGHTS (AUS)	3,680,000	1,085,000	216,000	1,165,000	6,147,000
ALOS - NIGHTS (SA)	8	16	8	82	14
ALOS - NIGHTS (AUS)	32	20	14	32	39
EXPENDITURE (SA)					\$35m


ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.

SNAPSHOT OF CURRENT STATISTICS – JUNE 2025


VISITORS

 24k


NIGHTS

 352k


AVERAGE LENGTH OF STAY

 15 nights


EXPENDITURE

 \$34m

AVERAGE SPEND

 \$98 per night \$1,435 per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #5 for visitors
#11 for nights
#14 for expenditure

AIR ACCESS

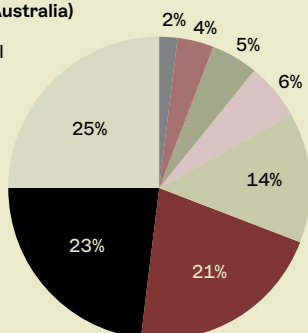
KEY CONNECTING AIRLINES

- Qatar Airways (QR)
- Emirates (EK)
- Singapore Airlines (SQ)
- Cathay Pacific (CX)
- Qantas Airways (QF)
- Multiple airlines offering connections via other Australian airports

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

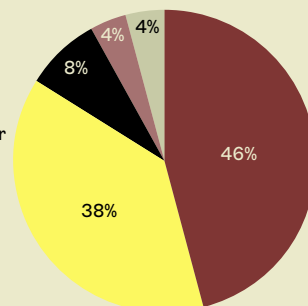
Visitor accommodation type (in South Australia)

- Caravan or camping - non-commercial
- Other commercial accommodation
- Backpacker or hostel
- Caravan park or commercial camping ground
- Rented house/apartment/flat/unit
- Other private accommodation
- Hotels and similar accommodation
- Friends or relatives' property



Travel party description (to South Australia)

- Adult couple
- Travelling alone
- Family group - parents and children
- Friends or relatives travelling together
- Other travel party



MARKET INSIGHTS

- German travellers no longer see travel as a luxury but as an essential part of life. Remote and lesser-known destinations, once favoured by adventurous travellers are becoming mainstream choices for more conscious travellers seeking to avoid overtourism.
- Key German trade partners are decentralised with clusters around the country as follows: Frankfurt/Munich/Stuttgart; Hamburg; Hannover; and Berlin/Dresden.
- Given the long-haul nature of travel to Australia, 64% of travellers plan most details within the six months leading up to their trip including ground transport, places to visit and accommodation.
- The South Australian Tourism Commission (SATC) works closely with key travel trade partners to showcase how South Australia is the perfect inclusion in an Australian itinerary.

- Developing awareness for South Australia among consumers is a key objective of the SATC, achieved through public relations and marketing activities.
- German visitors are discerning and knowledgeable travellers. They have high expectations who carefully plan, seek detailed information from a range of sources prior to departure, and expect that promises are delivered.
- 80% of visitors who booked via travel agents purchased full travel itineraries, with agents expecting this trend to continue. Pricing, distance and price sensitivity are key challenges.
- While German travellers have a tendency to consult a range of platforms for travel research and planning, they are embracing a multi-channel approach when booking their trips.

TARGET MARKET PROFILE



PRIMARY

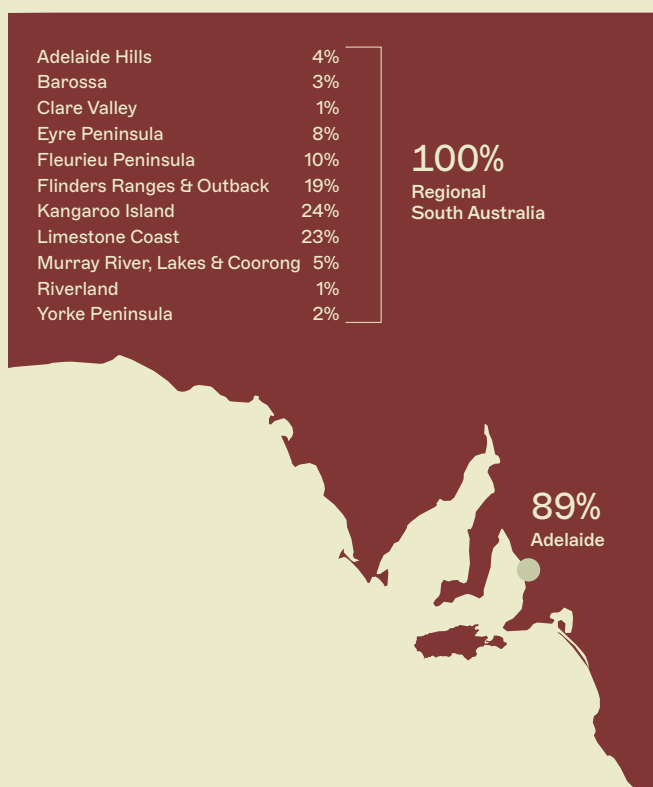
High value travellers represent on average 44% of the German long-haul travel market. They are experienced travellers with a preference for Australia, generally spend more than two weeks abroad, place high importance on nature, and fully independent travel.



SECONDARY

Youth traveller aged 18-29 years who plan to backpack or take a working holiday in Australia with high length of stay and wide regional dispersal.

VISITOR DISPERSAL**



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



83%

The local wildlife



68%

Friendly and welcoming citizens



56%

World-class beauty and natural environments



45%

Interesting attractions

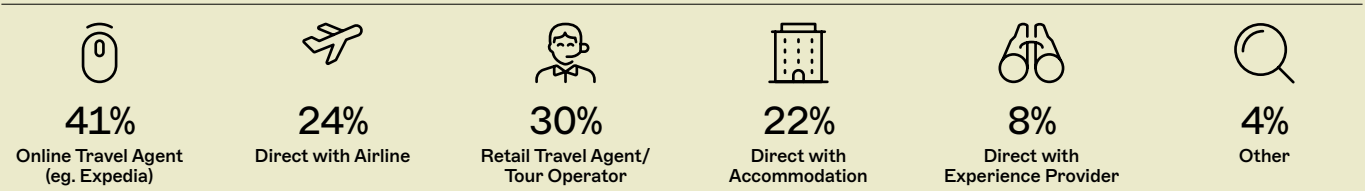


42%

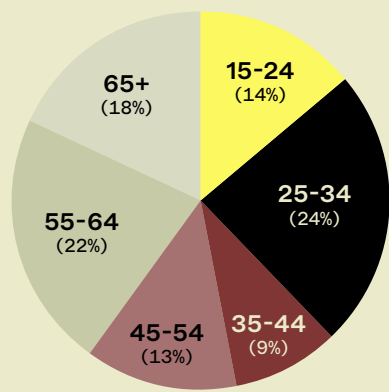
A safe and secure destination

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

BOOKING PREFERENCES



GERMAN VISITORS TO SOUTH AUSTRALIA BY AGE GROUP*



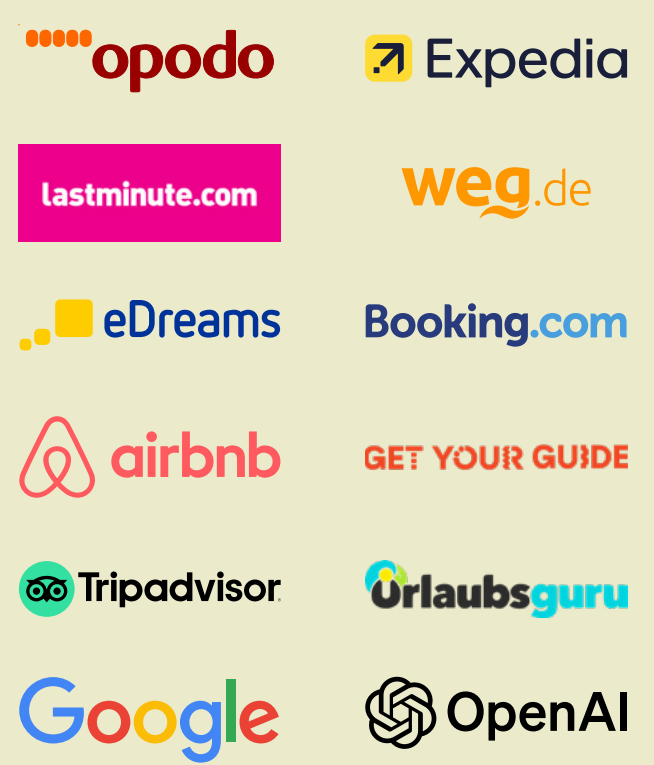
KEY TRADE PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
Australia Unlimited	ATS Pacific
Australia Tours	APTC
Best of Travel Group	Across Australia (formerly Goway)
Boomerang Reisen	Pan Pacific
DERTOUR Group (DERTOUR and Meier's Weltreisen)	Across Australia (formerly Goway) & Terra Nova Group
Explorers World of Travel	ATS Pacific
Tourlane	AOT
Travel Essence	Direct
Volatwo	ATS Pacific

GERMAN CHECKLIST

- Consider the following points when targeting travellers from Germany:
- ✔ Promote the expansive landscapes and secluded wilderness of South Australia.
 - ✔ Highlight accessibility from Adelaide to the regions. For example, Flinders Ranges is an easy 5 hour drive from Adelaide via the wineries of the Clare Valley or Barossa.
 - ✔ Travelling long-haul means that most German travellers will visit multiple Australian states. Therefore think about how your experience/product fits within an overall Australia itinerary.
 - ✔ German travellers seek information. Make sure to close the loop with itineraries and demonstrate what other products/experiences are accessible from your location/region.

TOP TRAVEL WEBSITES & APPS



CONTACT

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Government of South Australia
South Australian Tourism Commission

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.
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