

GERMANY

INTERNATIONAL MARKET UPDATE 2026

MARKET OVERVIEW

- Germany is South Australia's 6th largest inbound market and is ranked 16th for expenditure as of March 2026.
- 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.
- 46% of German visitors to South Australia have been to Australia before.*
- 80% of visits are for the purpose of Holiday, 22% for Visiting Friends and Relatives (VFR).*



FAST FACTS & FIGURES

Data is an annual average over 2 years ending March 2025-March 2026

GERMANY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	18,000	5,000	1,000	1,000	22,000
VISITS (AUS)	119,000	60,000	15,000	36,000	166,000
NIGHTS (SA)	146,000	108,000	7,000	76,000	337,000
NIGHTS (AUS)	3,322,000	1,172,000	184,000	1,249,000	5,927,000
ALOS - NIGHTS (SA)	8	22	8	109	15
ALOS - NIGHTS (AUS)	28	20	12	34	36
EXPENDITURE (SA)	\$33m				

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.

SNAPSHOT OF CURRENT STATISTICS – MARCH 2026

VISITORS

 21k

NIGHTS

 318k

AVERAGE LENGTH OF STAY

 15 nights

EXPENDITURE

 \$35m

AVERAGE SPEND

 \$109 per night \$1,680 per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #6 for visitors
#13 for nights
#16 for expenditure

AIR ACCESS

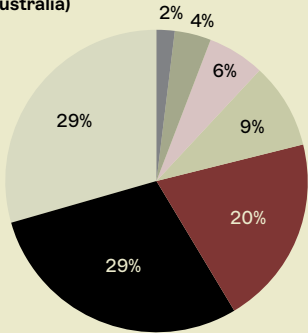
KEY CONNECTING AIRLINES

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

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

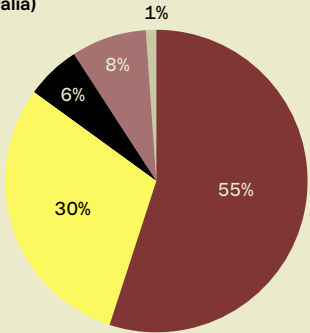
Visitor accommodation type (in South Australia)

- Caravan or camping - non-commercial
- 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 ahead of their trip to Australia. Traditional tour operators and travel agencies (still critical in Germany) including Key Distribution Partners (KDPs) specialising in personalised and experiential travel have the expertise required to serve the market effectively.
- 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 marketing activities.
- German visitors are discerning and knowledgeable travellers. They have high expectations, 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. Agents expect this trend to continue with pricing, distance and price sensitivity being key challenges.
- Hybrid booking behaviour persists: German travellers continue to rely on trusted, traditional providers for complex or long-haul trips, while also using digital channels for research and inspiration rather than as a sole booking path.
- More considered planning process: Travel decisions are increasingly deliberate, with longer evaluation periods as consumers balance inspiration with practical concerns such as safety, value, and overall cost.



*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

TARGET MARKET PROFILE



PRIMARY

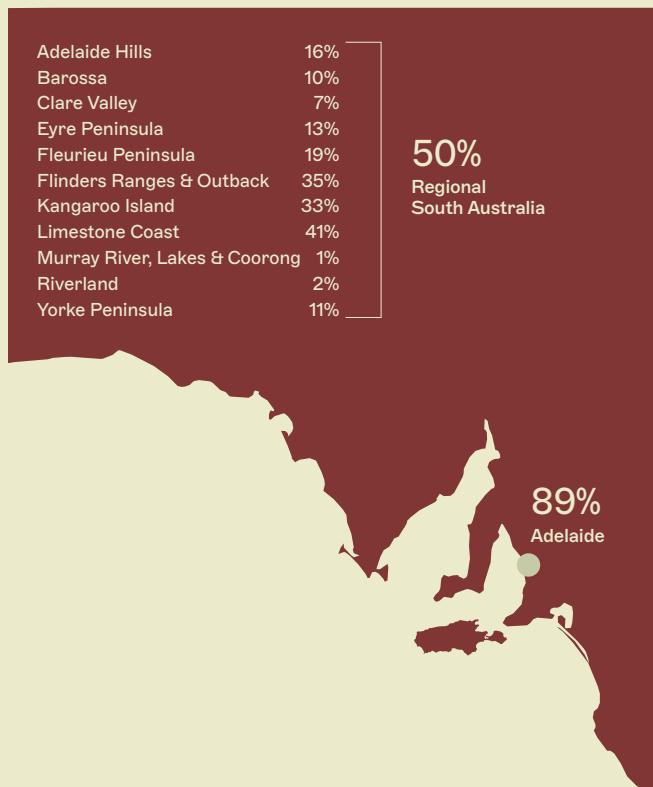
High value travellers represent on average 51% of the German long-haul travel market. They are experienced travellers with a preference for Australia, generally spend more than two weeks abroad, place high importance on nature, and fully independent travel.



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*



62%

The local wildlife



52%

Friendly and welcoming citizens



44%

World-class beauty and natural environments



33%

A safe and secure destination



25%

Good food and wine

BOOKING PREFERENCES



39%

Online Travel Agent
(eg. Expedia)



30%

Direct with Airline



27%

Retail Travel Agent/
Tour Operator



29%

Direct with
Accommodation



8%

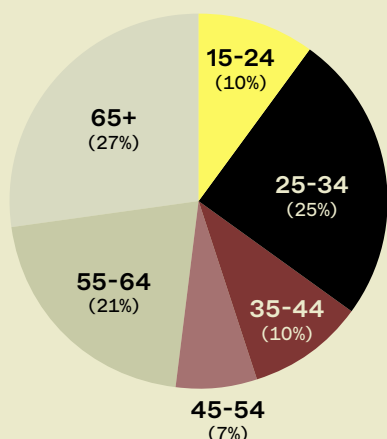
Direct with
Experience Provider



2%

Other

GERMAN VISITORS TO SOUTH AUSTRALIA BY AGE GROUP*



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.

KEY DISTRIBUTION PARTNERS

- Australia Unlimited
- Australia Tours
- Best of Travel Group
- Boomerang Reisen
- DERTOUR Group (DERTOUR and Meier's Weltreisen)
- Explorers World of Travel
- Tourlane
- Travel Essence
- Volatwo

TOP TRAVEL WEBSITES & APPS



lastminute.com

Booking.com



GET YOUR GUIDE



Trip.com



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Government of South Australia
South Australian Tourism Commission

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
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