RIESLING TRAIL
CLARE VALLEY

2024 INTERNATIONAL MARKET UPDATE
GERMANY

MARKET OVERVIEW

Results based on year ending June 2024

- Germany is South Australia's sixth largest inbound market and is currently 10% down on pre-Covid visitation levels, and 11% down on expenditure levels.
- German travellers often book their South Australia holiday 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, specifically Explorers Way.
- Most German visitors are free and independent travellers with self-drive remaining popular allowing wide regional dispersion into South Australia.
- Typical peak travel periods are the European winter season from September to April.
- 48% of German visitors to Australia are first time visitors.
- Germans are known to have a high rate of dispersal, visiting a couple of regions per trip.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

VISITORS

24k

NIGHTS

300k

EXPENDITURE

$34m

AVERAGE SPEND

$113 PER NIGHT

$1,444 PER VISITOR

AVERAGE LENGTH OF STAY

13 nights

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#6 FOR VISITORS

#15 FOR NIGHTS

#14 FOR EXPENDITURE

AIR ACCESS

GERMANY

Key Connecting Airlines

Qantas Airways (QF)

Singapore Airlines (SQ)

Emirates (EQ)

Multiple airlines offering connections via other Australian Airports

FAST FACTS & FIGURES

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

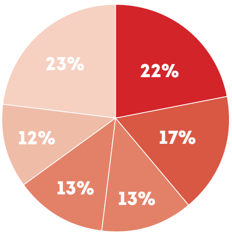
GERMANY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	23	4	2	1	27
Visits (AUS)	149	60	21	45	199
Nights (SA)	249	56	11	119	435
Nights (AUS)	5,873	1,045	238	1,277	8,434
ALOS - Nights (SA)	11	14	6	119	16
ALOS - Nights (AUS)	39	17	11	28	42
Expenditure					**$36M**

(000's)

ALOS = Average Length Of Stay. VFR = Visiting Friends and Relatives.

VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

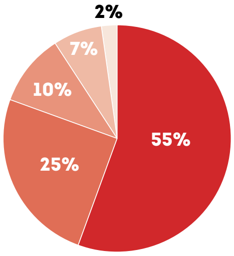


Visitor accommodation type (in SA)

- Homestay
- Rented house/apartment/flat or unit
- Caravan and camping
- Friends or relatives property
- Hotels and similar accommodation
- Other

Travel party description (to SA)

- Unaccompanied
- Adult couple
- Friends/relatives travelling together
- Family group
- Business



VISITOR DISPERSAL†

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

99% REGIONAL SOUTH AUSTRALIA

Adelaide Hills	3%
Barossa	4%
Clare Valley	2%
Eyre Peninsula	10%
Fleurieu Peninsula	12%
Flinders Ranges & Outback	21%
Kangaroo Island	20%
Limestone Coast	19%
Murray River, Lakes & Coorong	5%
Riverland	2%
Yorke Peninsula	3%

†Data includes visitors who travelled to multiple regions

IMPORTANCE FACTORS

Data from Consumer Demand Project (CDP) report - August 2023

49%
Safety and security
VS. **53%** GLOBAL AGGREGATE

48%
World class beauty and nature
VS. **40%** GLOBAL AGGREGATE

44%
Value for money
VS. **37%** GLOBAL AGGREGATE

40%
Friendly citizens
VS. **31%** GLOBAL AGGREGATE

38%
Good food and wine
VS. **37%** GLOBAL AGGREGATE

GLOBAL AGGREGATE: This is from the Consumer Demand Project research conducted quarterly by Tourism Australia in 12 key international markets for Australia. Global aggregate refers to the average across all these markets.

MARKET INSIGHTS

- The travel distribution system in Germany features wholesalers and direct sellers. Bookings through traditional retail agencies remain strong for long haul travellers aged over 40 years.
- There has been an increase in online bookings for airfares and accommodation, particularly those travelling for extended periods of time.
- Around 93% of all travel agencies are members of a cooperative or franchise system. The top five travel agency chains and franchise agencies for leisure travel are AER, ADAC, DER, TUI Leisure Travel, RTK Group, TSS Group, and Lufthansa City Center.
- Key German trade partners are decentralised with clusters around the country as follows: Frankfurt/Munich/Stuttgart,Hamburg, Hannover, and Berlin/Dresden.
- German travellers seek wildlife experiences, natural landscapes, soft adventure, authentic outback experiences, and unique coastal adventures.
- The SATC works closely with key travel trade partners to ensure South Australian holiday packages and deals are regularly promoted to German holiday planners, and showcases 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.

TARGET MARKET PROFILE

Primary

High Value Traveller representing on average 44% of the German long-haul travel market. They are experienced travellers with a preference for Australia and have the following characteristics: generally spend more than 2 weeks abroad, high importance placed on nature, and fully independent travel is preferred.

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.

BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024

42%	**29%**	**25%**	**23%**	**8%**	**4%**
Online Travel Agent (e.g. Expedia)	Retail Travel Agent/ Tour Operator	Direct with Airline	Direct with Accommodation	Direct with Experienced Provider	Other

TOP 3 BARRIERS TO VISITING AUSTRALIA

Data from Consumer Demand Project (CDP) report - August 2023

It is too far to travel

Expensive airfares

High cost of travelling around

CONTRACTING & BROCHURE TIMES

Contracting times have become more flexible in this market, however it is important to check with partners to ensure that the required information is provided when needed. European travel law is very strict, and operators have to provide exactly what is described in any brochures. Changes to product offerings must be advised to the travel partner as soon as possible.

GERMAN CHECKLIST

Consider the following points when targeting travellers from Germany:

- **Promote the expansive landscapes and secluded wilderness** of South Australia.
- **Demonstrate accessibility from Adelaide to the regions.** For example, the Barossa is a 1-hour drive from Adelaide.
- 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 for information. Make sure to **close the loop** with itineraries and demonstrate what other products/experiences are accessible from your location/ region.

KEY TRADE PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
Australia Unlimited	ATS Pacific
Australia Tours	APTC
Best of Travel Group	APTC
Boomerang Reisen	Australia One
DER Touristik	Goway
Explorers World of Travel	ATS and Real Adventures
Tourlane	Pan Pacific Travel
Travel Essence	Direct
TUI	APTC

TOP TRAVEL WEBSITES & APPS

opodo · Expedia · Booking.com · lastminute.com · GET YOUR GUIDE · ebookers.com · evaneos · secret Escapes · Urlaubsguru · Urlaubspiraten · TRAVELZOO

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SOUTH AUSTRALIA

Government of South Australia
South Australian Tourism Commission

Disclaimer: Source: International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).