

CONSUMER PROFILE GERMANY



SUMMARY

Traveller Profile

Motivations for travel

German travellers choose a destination based on world class nature, aquatic and coastal experiences and good food and wine. A destination must also satisfy the rational factors of safety and security and value for money.

Where are they going?

The most visited destination for German travellers is the USA, followed by Thailand, China, the UAE and Canada. Australia is 11th on the list in terms of trips taken in 2016, following the Dominican Republic.

Where do they want to go?

The USA (ex. Hawaii) and the Caribbean are most definitely on their to-do list in the next two years. Australia makes it to fourth and fifth positions on the aspiration and intention lists, respectively, but the USA and the Caribbean are the priority for German travellers.

Who do they travel with?

Over half of German consumers travel as a couple.

Perceptions of Australia

Australia is well-placed to deliver on the importance factors which are most highly ranked among German travellers, with Australia being ranked in second and fourth positions for world-class nature and aquatic and coastal experiences, respectively.

Traveller Behaviour

How do they prefer to travel?

- › Trip length is longer than the average of international travellers, at 16 nights featuring an average of four destinations.
- › Preferred styles of travel include beach holidays and visiting family and friends.
- › The vast majority of German consumers are independent travellers, opting for semi- or fully-independent style travel.

When do they travel?

March, August and October are the peak travel months for German consumers, with lead times typically falling between three to six months.

For travel to Australia, specifically, October to March is the peak travel period for German travellers.

How do they plan to travel?

For early planning and inspiration, German travellers are using a combination of online and offline sources, including searching the internet, reading travel and guide books and talking to friends and family.

How do they book travel?

When it comes to booking, the majority are doing so via a travel agent, either by telephone, in person or online.



TripAdvisor Facts

Germany is the ninth largest international market viewing Australia on TripAdvisor, at 3.3% of all sessions. In 2016 this figure increased by 21.4% year-on-year. With Germany's position as the ninth largest international market viewing Australia, this represents a relatively small market share of all the international destinations they are searching.

GERMAN TRAVELLER PROFILE



MARKET OVERVIEW

In 2016, Germany was Australia's 11th largest inbound market for visitor arrivals and total visitor spend and eighth largest for visitor nights.



Holiday^{o§}

60%



Visiting friends & relatives^{o§}

17%



Business^{o§}

9%



Other^{o§†}

13%



\$1.2bn

Total spend²
(↑ 8 per cent)



Average nights stayed^o

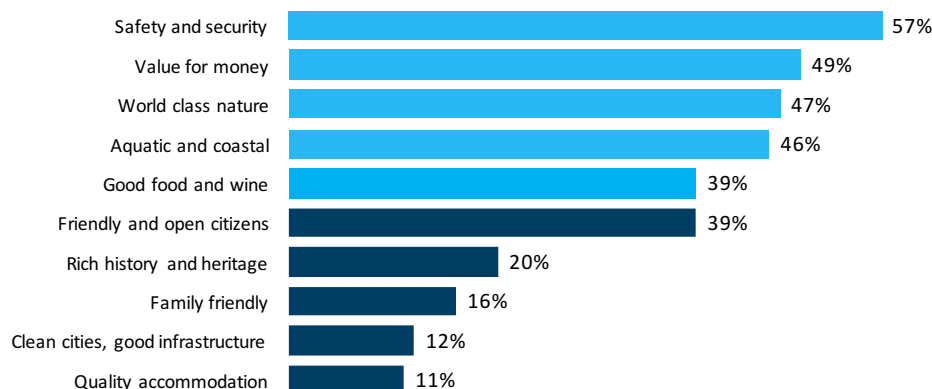


Median nights stayed^o

The information in this fact sheet comes from Tourism Australia's (TA) international consumer research study the 'Consumer Demand Project' (CDP). The CDP was set up in 2012 to look into how global consumers view Australia and what most motivates them to visit.

Insights from the CDP have been used extensively to inform and support development of TA's strategic direction, campaign development as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism. The research is used to help shape the future marketing of Australia and identify opportunities to make the country's tourism offering more attractive to overseas visitors.

Most important factors when selecting a holiday destination



Read as: 57% of respondents rate 'safety and security' among the top five most important factors when choosing a holiday destination.

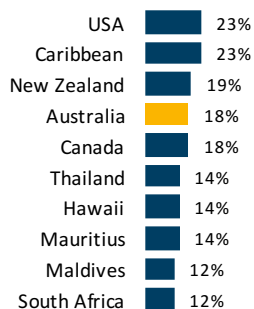
Notes: ^oAverage nights: the sum of all nights divided by the sum of all visitors. ^{**}Median nights: represents the midpoint length of stay for which 50% of visitors stay less and 50% stay longer, removing the impact of very long stay visitors. ^oData refers to an average of 2012-2016. [§]Refers to share of arrivals of respective purpose. [†]Other includes education, employment and others. Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016.

AUSTRALIA'S POSITION AND OPPORTUNITY

Purchase funnel

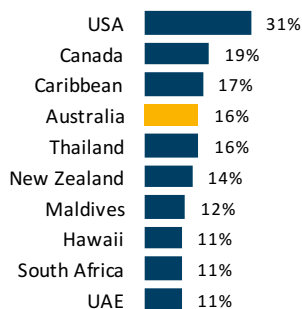
Aspiration

Which of the following destinations are you *considering travelling to* in the next 4 years?



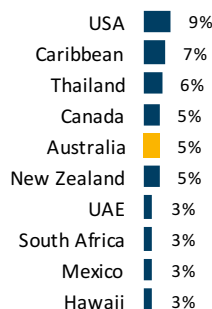
Awareness of holiday experiences

How aware would you say you are of the holiday experiences on offer in the following destinations?



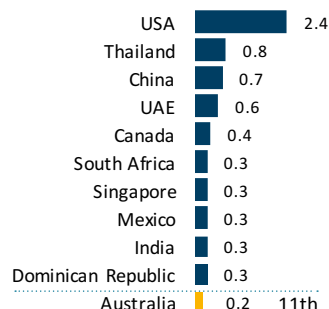
Intention

Which of the following destinations are you *actively planning to visit* for a holiday in the next 2 years?



Visitation

Millions of trips in 2016¹



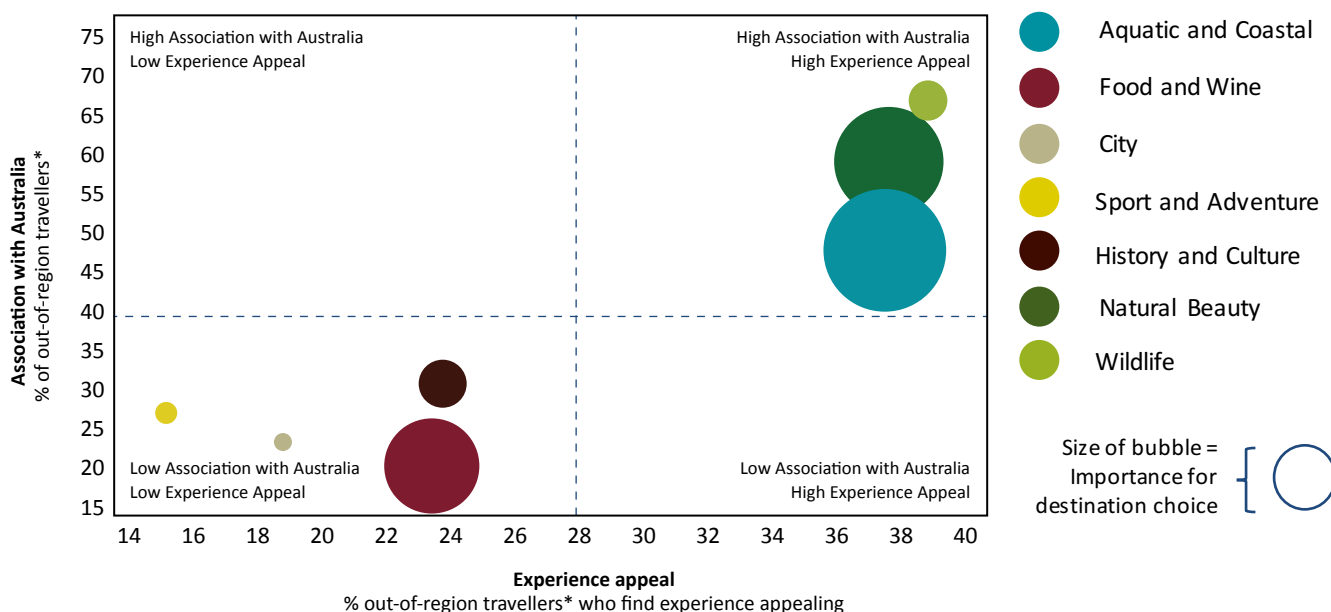
Read as: 18% of German consumers are considering travel to Australia in the next 4 years, while 5% are intending to visit in the next 2 years. Australia is ranked #11 for visitation against other out-of-region (OOR) destinations for German travellers.

Notes: *Hawaii is included in US for visitation figures as cannot be separated. Sources: 1. Tourism Economics, YE2016

Opportunity matrix

The opportunity matrix is a comprehensive way to showcase the opportunity for Australian tourism through identifying the key thematic appeals and experience categories.

Among the German market, Australia performs strongest with respect to natural beauty, aquatic and coastal and wildlife experiences. Wildlife experiences have a slightly stronger level of appeal and association with Australia (higher and to the right), while aquatic and coastal experiences are considered most important (larger bubble). Food and wine experiences are also important among this market, but generate lower levels of association with Australia.



Read as: Food and wine experiences are important among the German market, and while there is a moderate level of tested appeal for Australia's food and wine experiences, the unprompted association with these types of experiences is weaker than average.

Notes: *Out-of-region travellers refers to consumers travelling outside their region of residence.

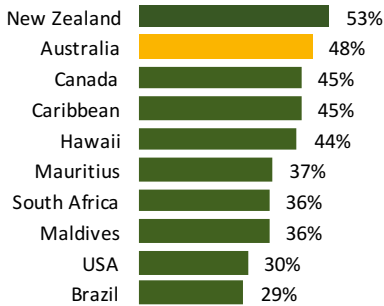
NATURE AND WILDLIFE

How does Australia rate?

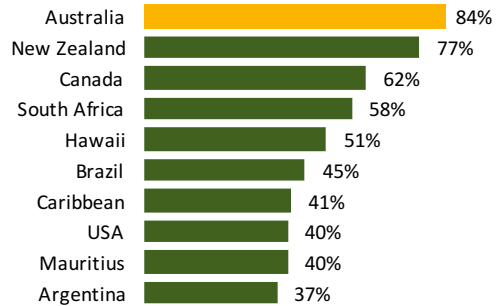
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

World class nature

Respondents who have not visited Australia



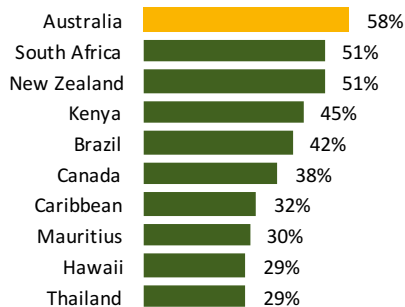
Respondents who have visited Australia



Read as: 48% of respondents who have not visited Australia associate Australia with 'world class nature.' This figure rises to 84% among those who have visited.

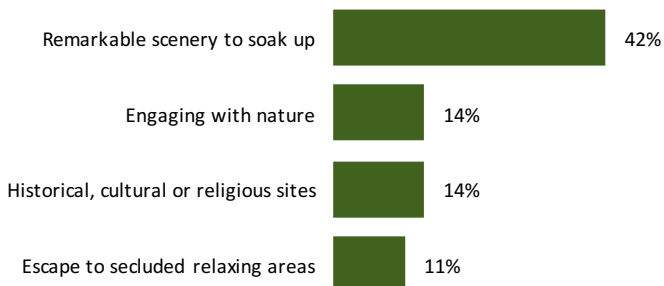
Unique and interesting wildlife

Total respondents



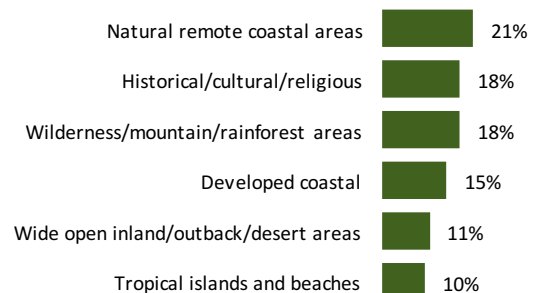
Read as: 58% of total respondents associate Australia with 'unique and interesting wildlife.'

Elements of 'world class nature'



Read as: 42% of respondents said that 'remarkable scenery to soak up' is a key element of 'world class nature'.

Most important types of 'world class nature'



Read as: 21% of respondents said 'natural remote coastal' environments are an important type of 'world class nature'.

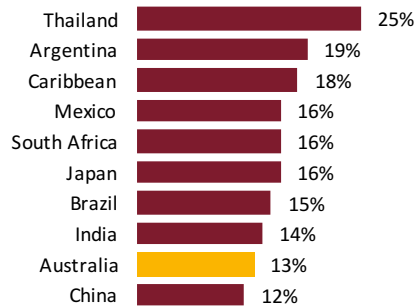
FOOD AND WINE

How does Australia rate?

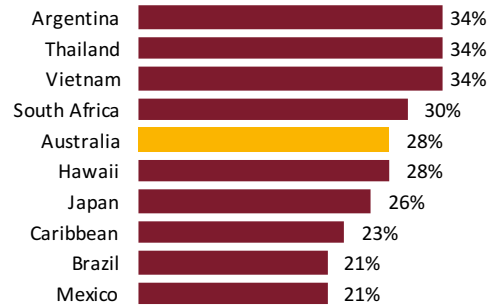
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Good food and wine

Respondents who have not visited Australia

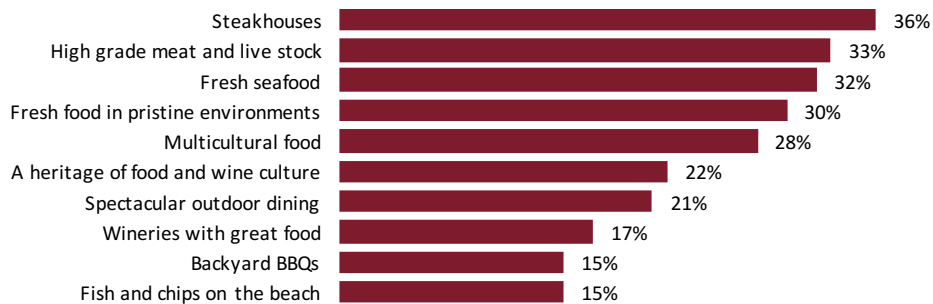


Respondents who have visited Australia



Read as: 13% of respondents who have not visited Australia associate Australia with 'good food and wine.' This figure rises to 28% among those who have visited.

Current associations with Australian food and wine



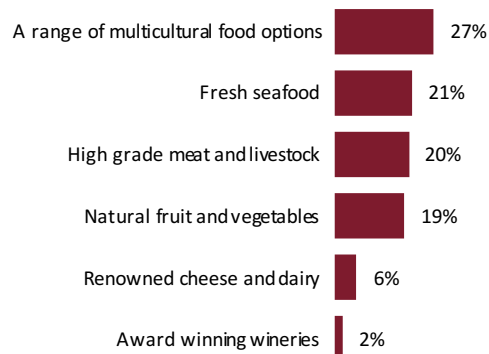
Read as: 36% of respondents associate Australian food and wine with 'Outback Steakhouses'.

Elements of 'good food and wine'



Read as: 39% of respondents said 'a national style of cooking' is a key element of 'good food and wine.'

Important types of 'good food and wine'



Read as: 27% of respondents said 'a range of multicultural food options' is an important type of 'good food and wine'.

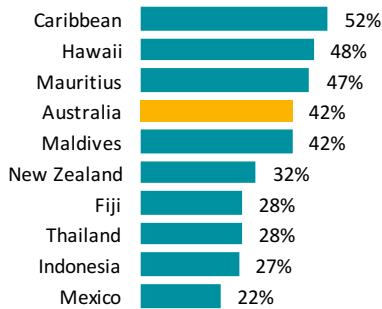
AQUATIC AND COASTAL

How does Australia rate?

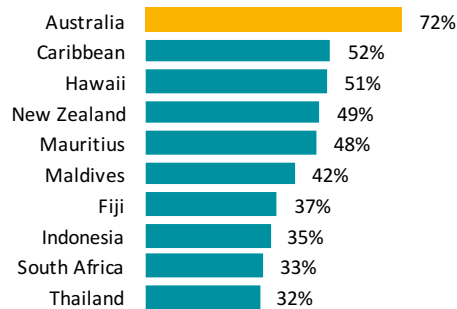
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Aquatic and coastal

Respondents who have not visited Australia



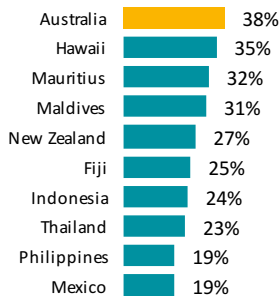
Respondents who have visited Australia



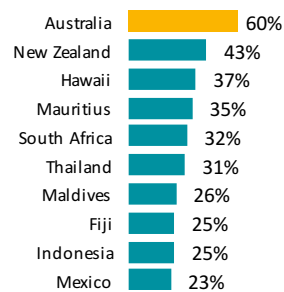
Read as: 42% of respondents who have not visited Australia associate Australia with 'aquatic and coastal' experiences. This figure rises to 72% among those who have visited.

Remote coastal, beach and aquatic locations

Respondents who have not visited Australia



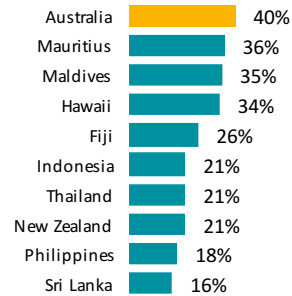
Respondents who have visited Australia



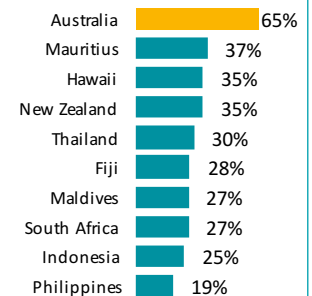
Read as: 60% of respondents that have visited Australia associate Australia with 'Remote coastal, beach and aquatic locations'.

Aquatic wildlife

Respondents who have not visited Australia



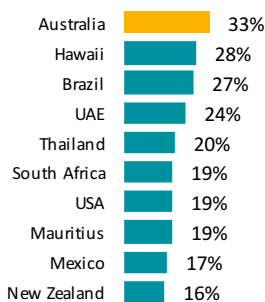
Respondents who have visited Australia



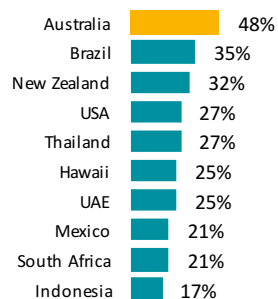
Read as: 65% of respondents that have visited Australia associate Australia with 'aquatic wildlife'.

Developed coastal and beach locations

Respondents who have not visited Australia



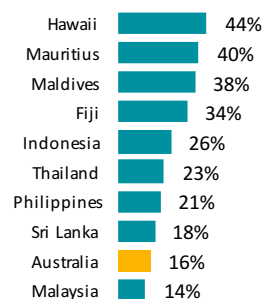
Respondents who have visited Australia



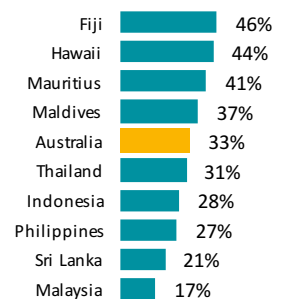
Read as: 48% of respondents that have visited Australia associate Australia with 'developed coastal and beach locations'.

Tropical islands and locations

Respondents who have not visited Australia



Respondents who have visited Australia

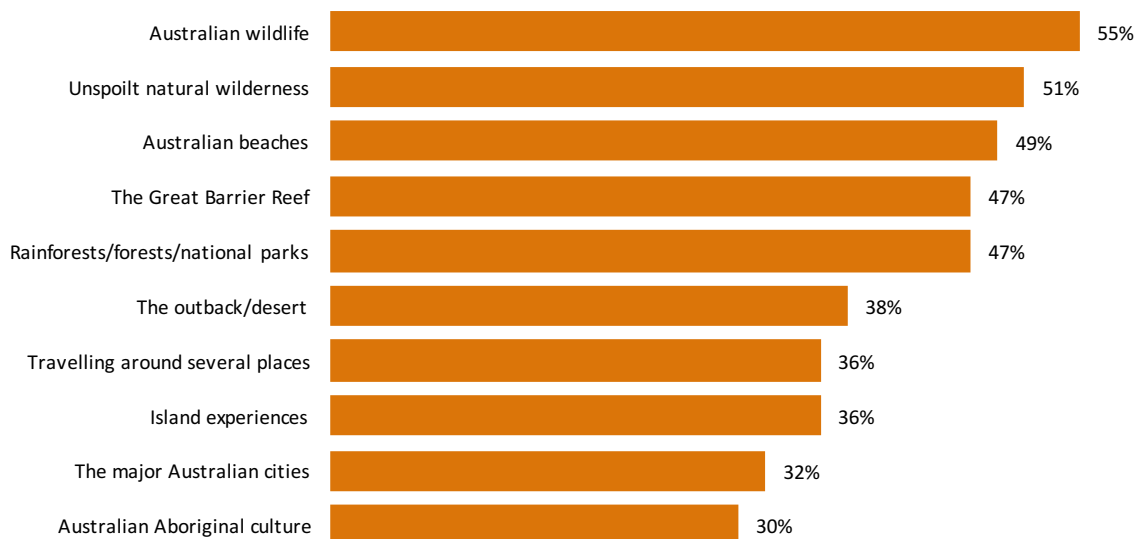


Read as: 33% of respondents that have visited Australia associate Australia with 'tropical islands and locations'.

ATTRACTIONS AND EVENTS

Attractions and events play a valuable role in attracting visitors to Australia in addition to encouraging visitors to disperse throughout the country and extend their stay.

Top 10 Australian attractions

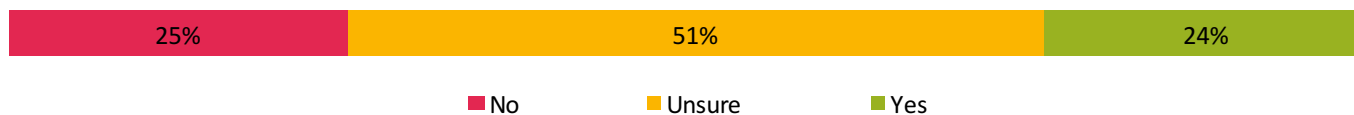


Read as: 55% of respondents indicate 'Australian wildlife' as an appealing Australian attraction.

Leisure events

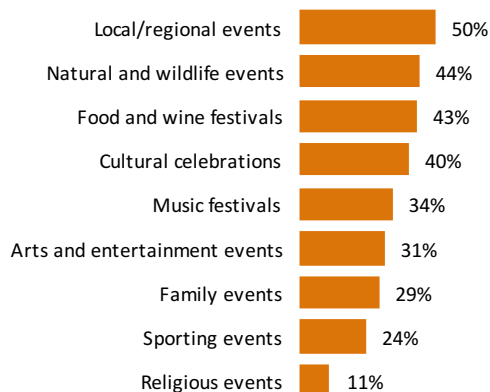
Respondents were asked to what extent they agreed with the following statement:

When travelling internationally I always look to time my trip and places visited with an event or festival of interest.



Read as: 24% of respondents indicate that they always look to time their trip and places visited with an event or festival of interest.

Most appealing events to attend overseas



Read as: 50% of respondents indicate 'local/regional events' as appealing elements when travelling overseas.

Events with the greatest influence on destination choice

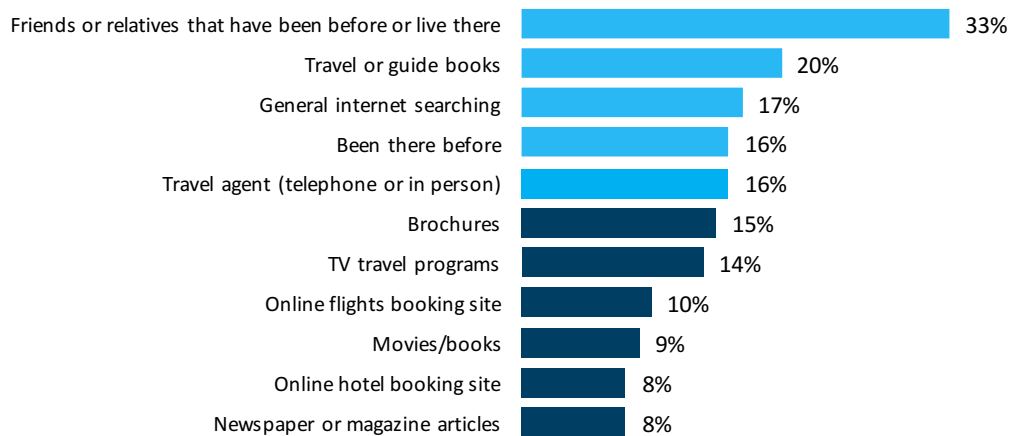


Read as: 25% of respondents indicate the influence of 'major sporting events' on destination choice.

PLANNING AND BOOKING INFORMATION SOURCES

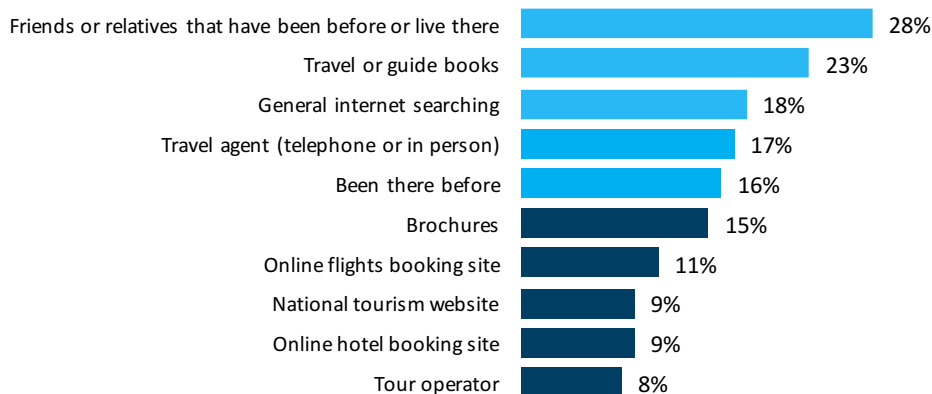
The following charts highlight the information sources that German consumers use to plan and book their holidays.

Preferred sources for *early planning and holiday inspiration*



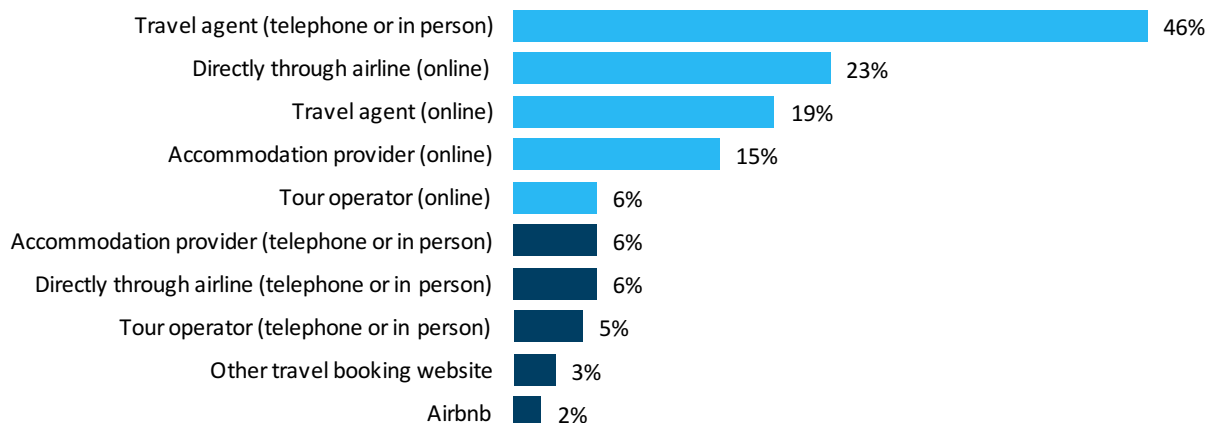
Read as: 33% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source during the early stages of planning a holiday.

Preferred sources for *seeking information about a holiday destination*



Read as: 28% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source for seeking information about a holiday destination.

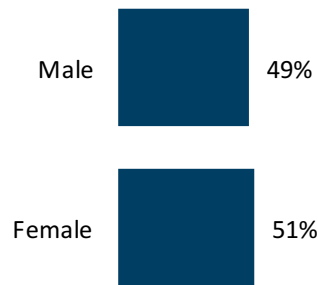
Preferred sources used to *book a holiday*



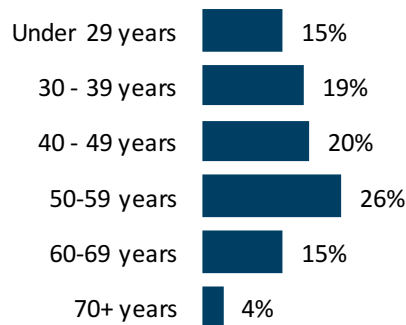
Read as: 46% of respondents indicate 'travel agent (telephone or in person)' as a preferred source when booking a holiday.

RESPONDENT PROFILE

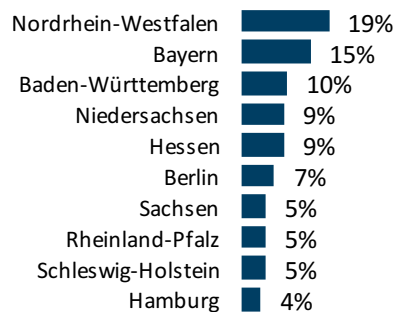
Gender



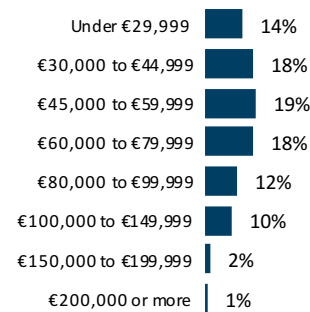
Age



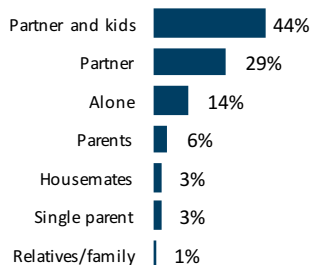
Place of residence



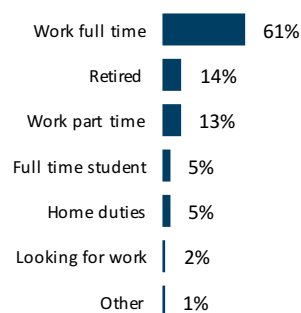
Income



Living situation



Employment status



Occupations



ABOUT THE RESEARCH

The Consumer Demand Project (CDP) research is carried out by BDA Marketing Planning, a consultancy who specialise in international demand side strategy development and consumer research. It helps determine the strategic priorities to achieve the Tourism 2020 goal, by providing a comprehensive assessment of Australia's current destination appeal and the latent demand potential. The research is conducted annually across eleven of Australia's key tourism markets: China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA. In 2016, the following markets were integrated into the program: Hong Kong, Taiwan, Canada, Brazil, France and Italy. Over the last five years, Tourism Australia have spoken to over 90,000 international long-haul travellers via online research panels.

WANT TO KNOW MORE?

Fact sheets for seventeen of Australia's key tourism markets can be accessed at: <http://www.tourism.australia.com/statistics/consumer-demand-research.aspx>

For more information, please contact:

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