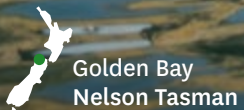


NEW ZEALAND VISITOR PROFILE: GERMANY

July 2022 - June 2023



**100% PURE
NEW ZEALAND**

TOURISM NEW ZEALAND'S MARKET APPROACH

Our Purpose

Enrich Aotearoa New Zealand and all who visit.

Tourism must enrich New Zealand and the wellbeing of New Zealanders – contributing more than what it takes.

Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud.

Our Role

Tourism New Zealand is New Zealand's national destination marketing organisation.

Market Approach

Tourism New Zealand focuses on shaping the high-quality visitor mix through activity across a diverse portfolio of markets.

Our markets are determined by factors including there being an existing or potential group of people actively considering New Zealand as a destination.

Active Considerers

Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These people are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

High Quality Visitors

Among those actively considering a New Zealand holiday, Tourism New Zealand further focuses on attracting High Quality Visitors.

These visitors are defined by the way they positively contribute to New Zealand's natural environment, culture, society and economy.

They are determined by their scope of activities, how they travel across seasons and regions, their environmental consciousness and engagement with our local culture and communities.

Mix of Markets

Our markets include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom



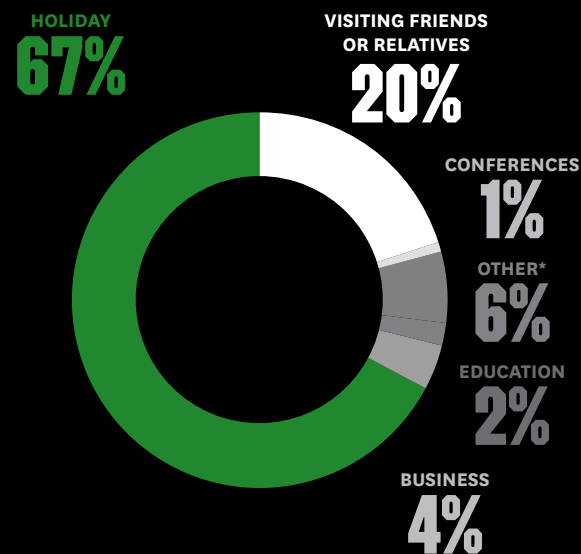
GERMANY

VISITOR SNAPSHOT

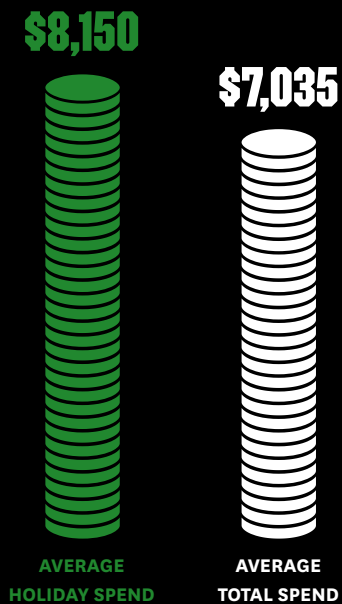


The number of visitors from Germany who arrived in New Zealand in the year ending June 2023 was 50,673 making up 2.0% of total arrivals. The majority of them (67%) came for holiday purposes spending about \$228 million

PURPOSE OF VISIT



AVERAGE SPEND PER VISITOR



TOTAL MARKET SPEND



Source: Stats NZ International Visitor Arrivals July 2022 – June 2023

MBIE International Visitor Survey (IVS) July 2022 – June 2023

*Other or not stated

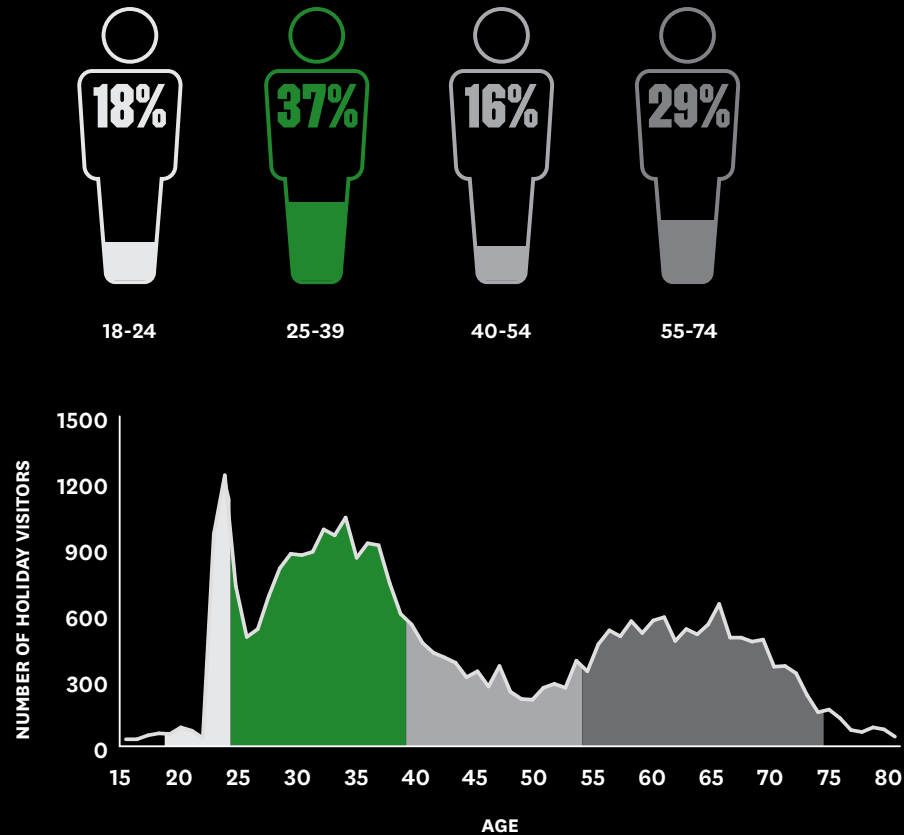
GERMANY

VISITOR SNAPSHOT

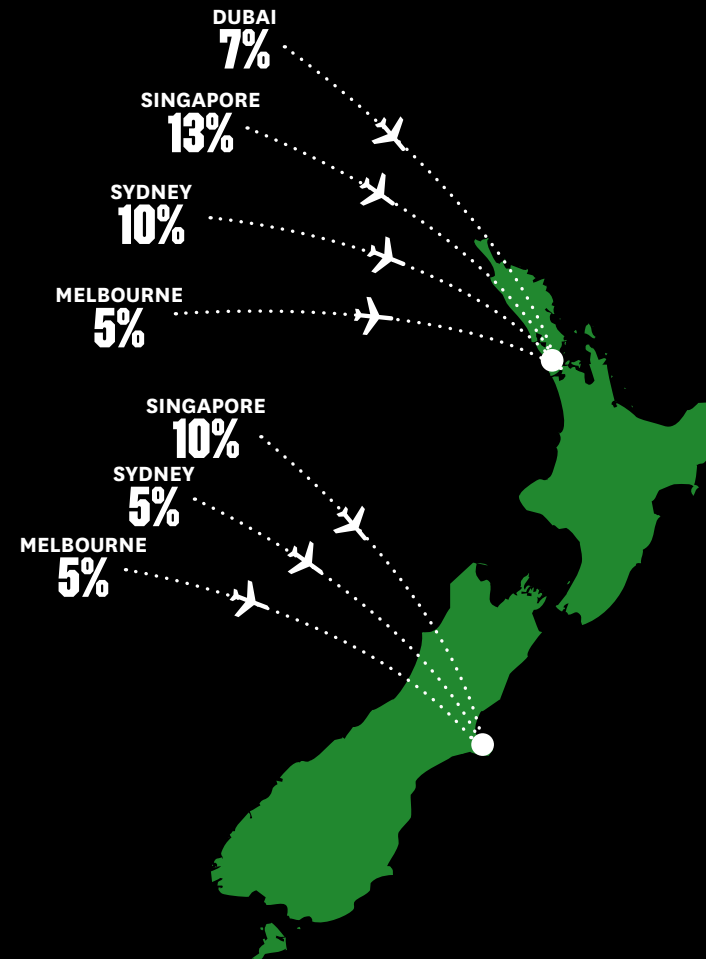


Germany attracts a number of young backpackers, some taking advantage of the working holiday scheme to experience the culture and lifestyle of New Zealand

AGE PROFILE OF HOLIDAY VISITORS



Most German holiday travellers arrived to Auckland



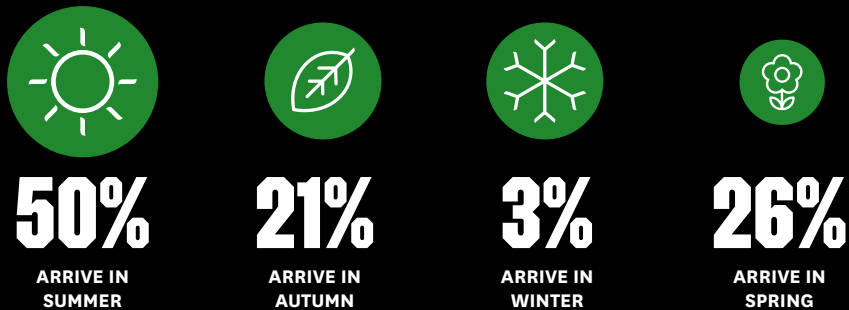
Source: Stats NZ International Visitor Arrivals July 2022 – June 2023
 MBIE International Visitor Survey (IVS) July 2022 – June 2023

GERMANY

VISITOR SNAPSHOT



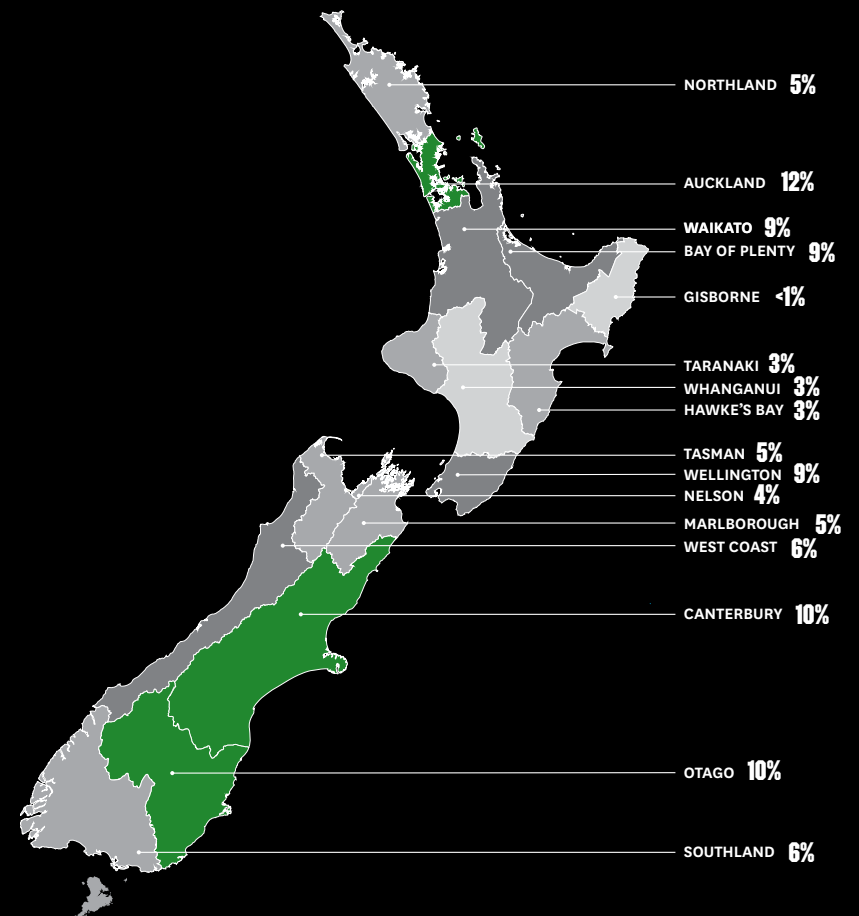
The majority of holiday visitors arrived in summer, stayed for a long period of time and had a significant impact on the local economies



LENGTH OF STAY (DAYS)



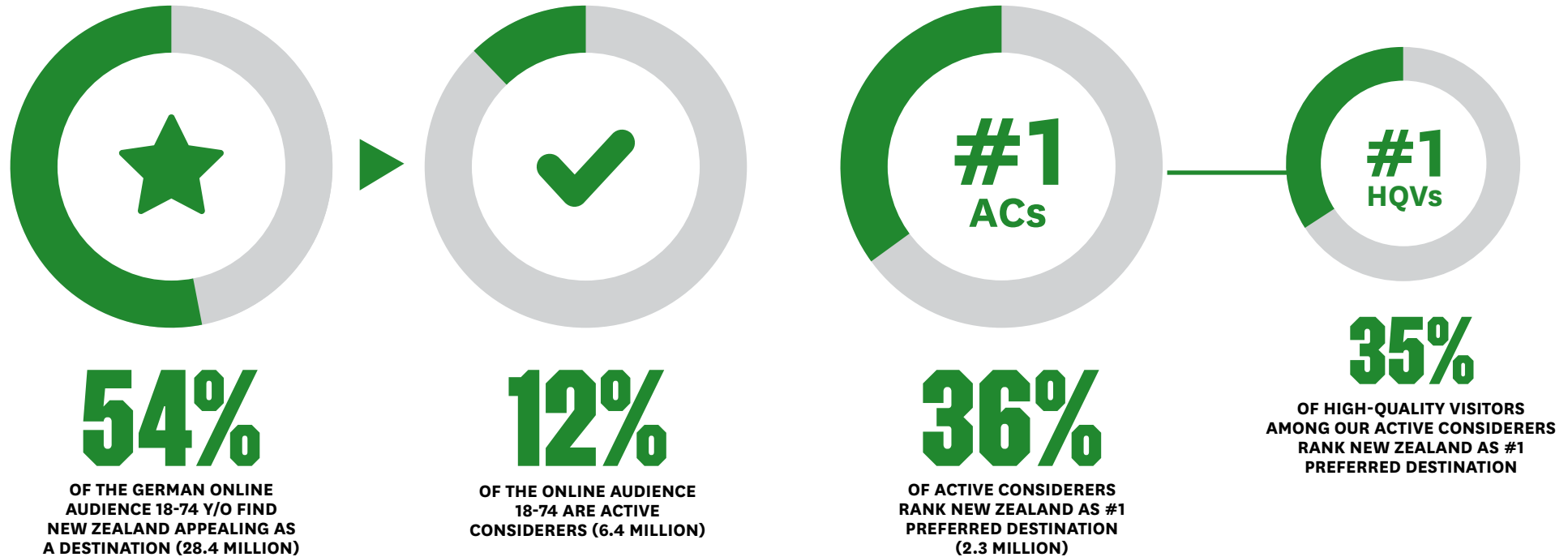
Holiday arrivals from Germany spend \$228M in the regions



Source: Stats NZ International Visitor Arrivals July 2022 – June 2023
 MBIE International Visitor Survey (IVS) July 2022 – June 2023

GERMANY

ACTIVE CONSIDERER METRICS



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so. Within our AC pool, we further target High Quality Visitors (HQVs) for conversion to arrivals. They see more regions, are sustainability minded and have higher preference for and urgency to visit New Zealand.

Active Considerer Monitor data 6-month period ending June 2023

GERMANY

ACTIVE CONSIDERERS AND HIGH QUALITY VISITORS – PROFILE



TOTAL ACTIVE CONSIDERERS

6.4M

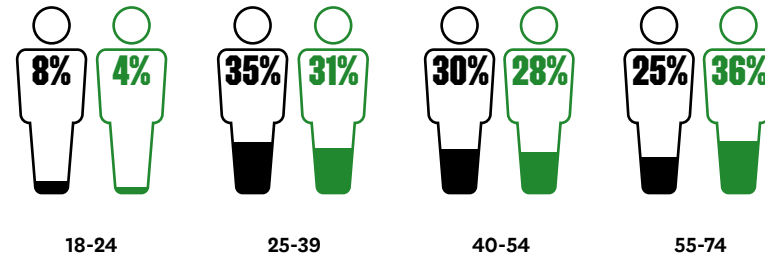
APPROXIMATE NUMBER OF ACTIVE CONSIDERERS IN GERMANY

43%

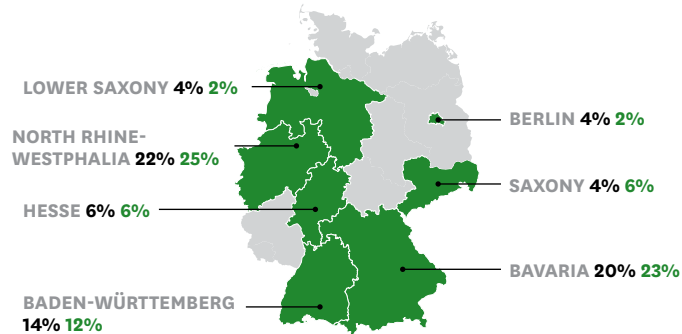
OF THEM ARE HQVs (2.8M)



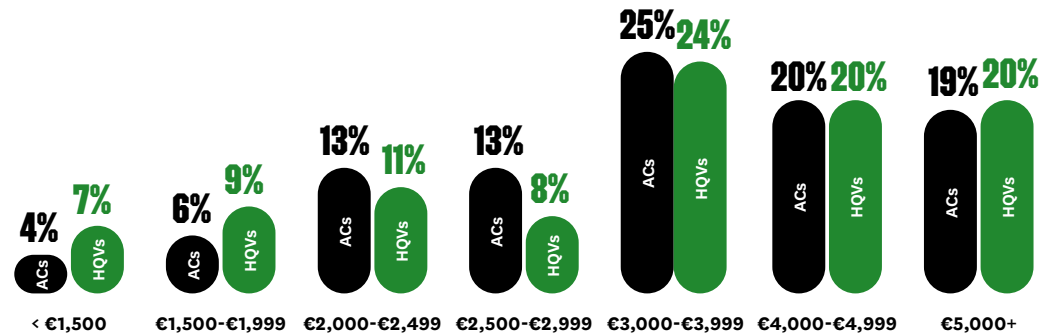
AGE SEGMENT OF ACTIVE CONSIDERERS



REGIONAL SPREAD



MONTHLY HOUSEHOLD INCOME SPREAD - ACs VS HQVs



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Active Considerer Monitor data 6-month period ending June 2023

KEY

- Active Considerers
- High Quality Visitors

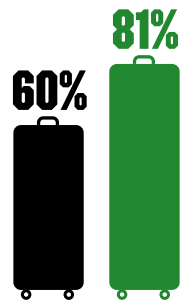
GERMANY

ACTIVE CONSIDERERS AND HIGH QUALITY VISITORS – MOTIVATIONS AND BARRIERS



REASONS FOR VISITING NEW ZEALAND ON HOLIDAY

TO GET IN TOUCH WITH NATURE



TO EXPERIENCE BEAUTIFUL LANDSCAPES/ SCENERY



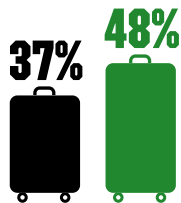
TO INTERACT WITH PEOPLE OF A DIFFERENT CULTURE OR LIFESTYLE



TO LEARN AND EXPLORE NEW THINGS



TO FEEL A SENSE OF ADVENTURE



TO INDULGE AND PAMPER MYSELF



TO TAKE A BREAK FROM THE ROUTINE, STRESSES AND PRESSURES OF EVERYDAY LIFE



TO FEEL RELAXED AND REFRESHED



KNOWLEDGE GAPS



THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND

44% 47%



WHAT THE WEATHER IS LIKE

34% 30%



WHAT IS THE LENGTH OF TIME NEEDED TO EXPERIENCE NEW ZEALAND PROPERLY

27% 31%



HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS

25% 24%



WHAT/WHERE THE RECOMMENDED THINGS TO SEE AND DO ARE

23% 23%



HOW EASY IS IT TO TRAVEL AROUND

22% 22%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so. Within our AC pool, we further target High Quality Visitors (HQVs) for conversion to arrivals. They see more regions, are sustainability minded and have higher preference for and urgency to visit New Zealand.

Active Considerer Monitor data 6-month period ending June 2023

KEY

- Active Considerers
- High Quality Visitors

GERMANY

ACTIVE CONSIDERERS AND HIGH QUALITY VISITORS – INTEREST IN ACTIVITIES



LAKES, RIVERS, WATERFALLS

90% **97%**



VISITING NATIONAL PARKS, NATURE RESERVES OR NATIVE FORESTS

89% **97%**



BEACHES AND COASTS

88% **96%**



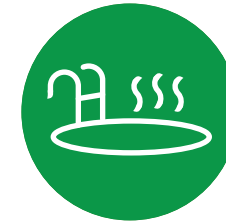
NATIVE FORESTS

88% **95%**



LOCAL TOWNS

87% **93%**



GEOHERMAL SITES

86% **93%**



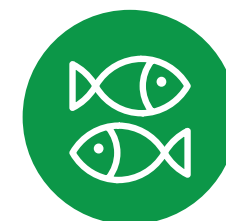
HISTORICAL AND HERITAGE SITES

86% **96%**



LOCAL CUISINE

86% **96%**





MARINE RESERVES

89% **94%**

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Active Considerer Monitor data 6-month period ending July 2023

KEY

-  Active Considerers
-  High Quality Visitors*