

GERMANY

Visitors & Market Insights

July 2024



Waitakere Ranges
Auckland



**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

To promote New Zealand as a visitor destination to key markets around the world. Tourism New Zealand's new four-year strategy focuses on building desire for New Zealand as a year-round destination and converting that desire into off-peak arrivals. Off-peak seasons refer to the seasons between March-November in New Zealand – autumn, winter and spring.

Market Approach

Tourism New Zealand focuses on shaping the 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, find New Zealand highly appealing, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Stats NZ's International Visitor Arrivals and MBIE's International Visitor Survey.

Mix of Markets

The mix of markets covered in our Market Snapshots include:

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



TRAVELLER INSIGHTS

Latest German market arrival insights

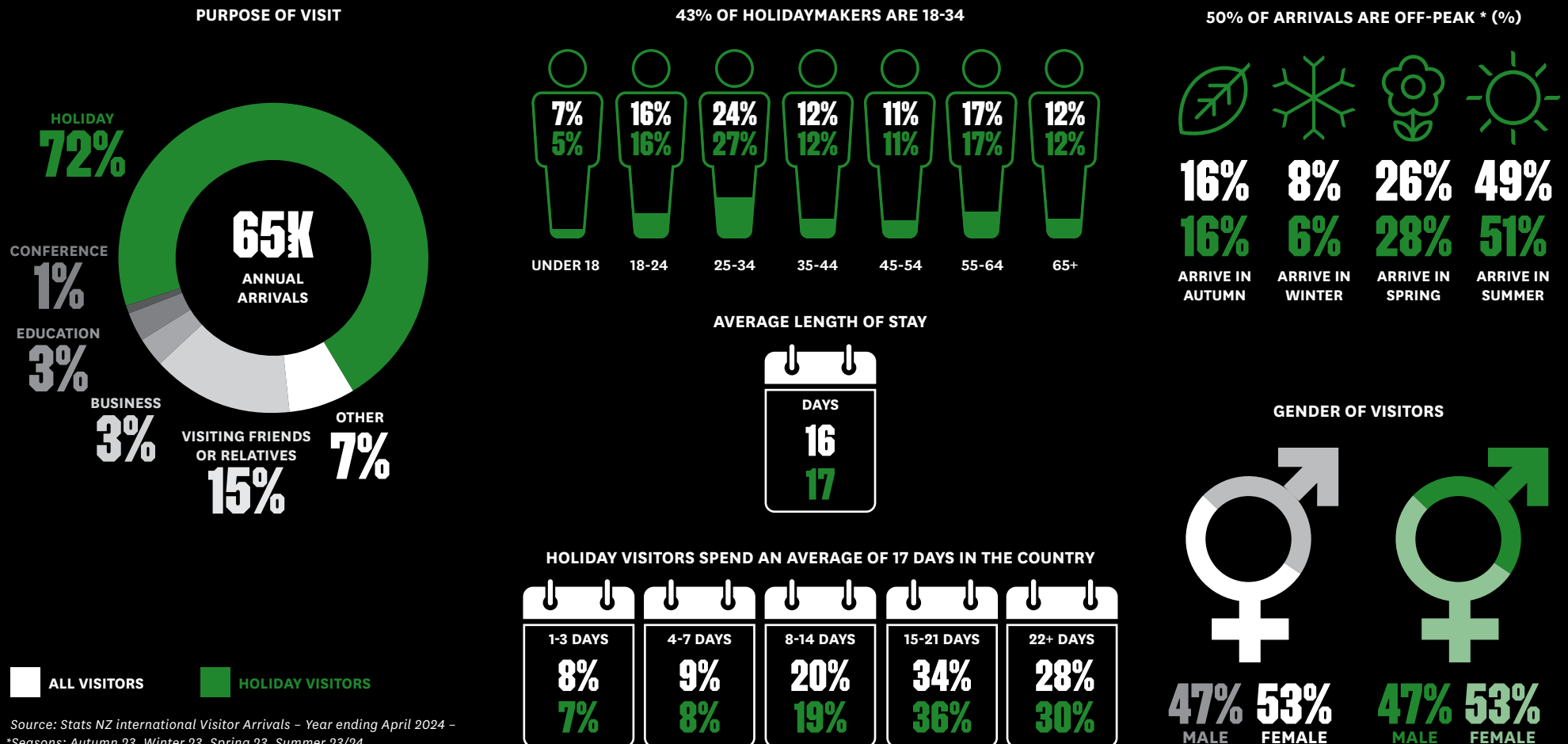


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TRAVELLER INSIGHTS



Last year, 64,700 German travellers (1.2% of all arrivals) visited New Zealand, with 46,500 (72%) of them being holiday visitors.

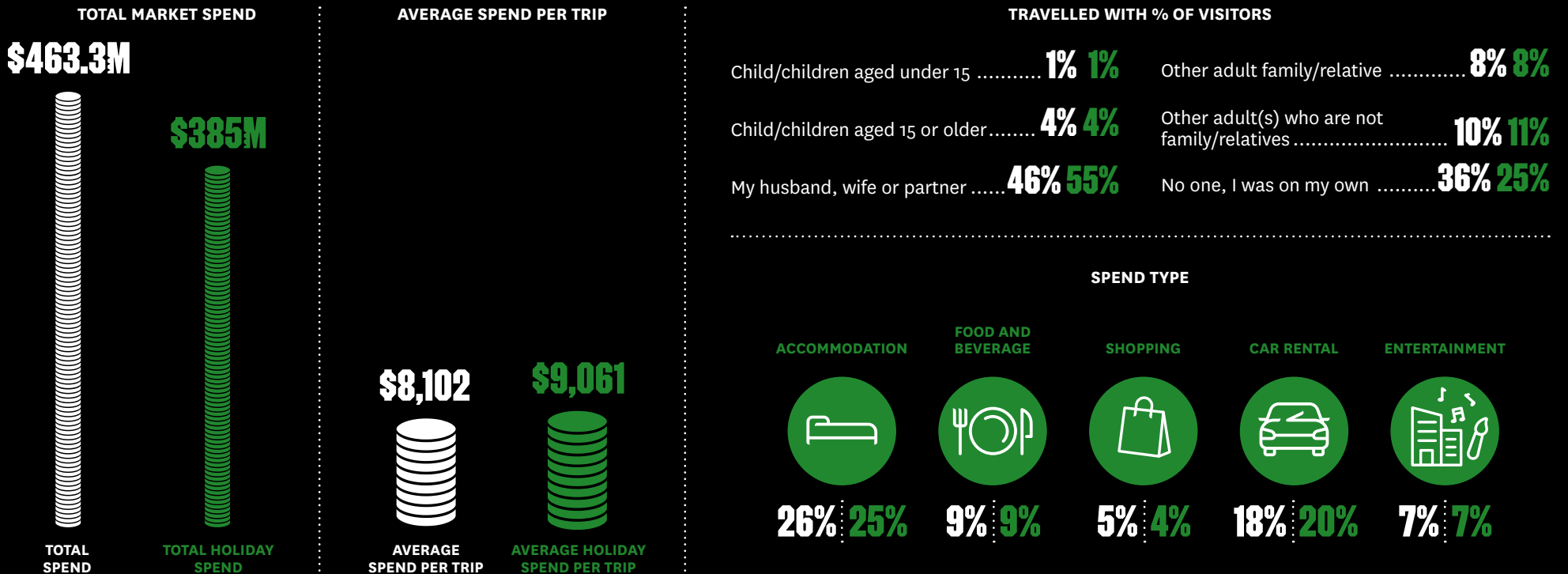


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VISITOR SNAPSHOT



German visitors spent \$463.3 million in New Zealand, with \$385 million by holidaymakers. The average spend per trip was \$8,102, rising to \$9,061 for holiday visitors. One-quarter of spending was on accommodation, and visitors were most likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

Source: MBIE, International Visitor Survey | Year ending March 2024

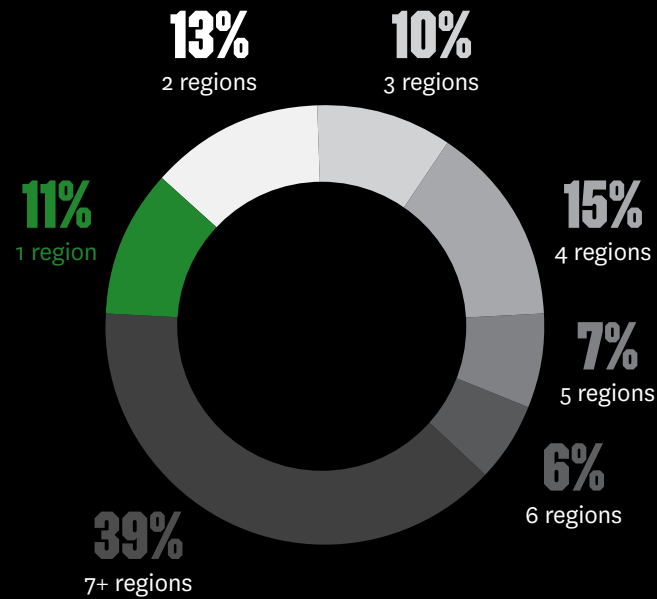
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TRAVELLER INSIGHTS

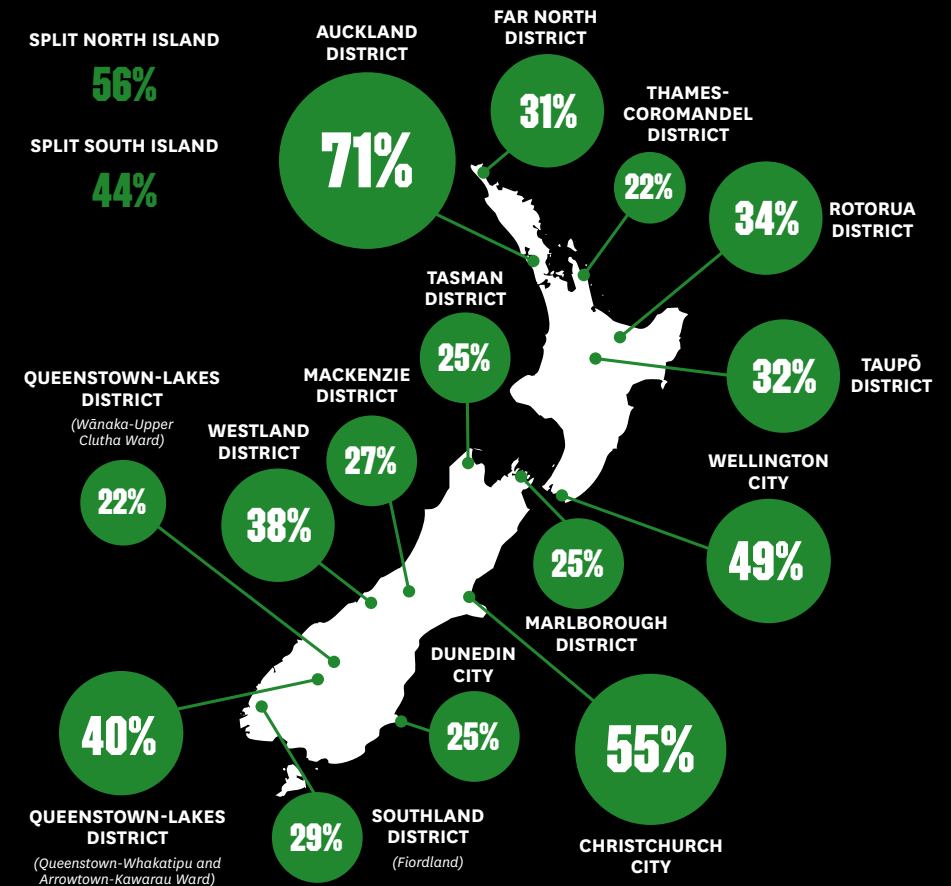


German holiday visitors spent an even amount of time in the North Island (56% of nights), and the South Island (44% of nights). Among them, 66% visited four or more regions, with Auckland being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



Source: MBIE, International Visitor Survey | Year ending March 2024

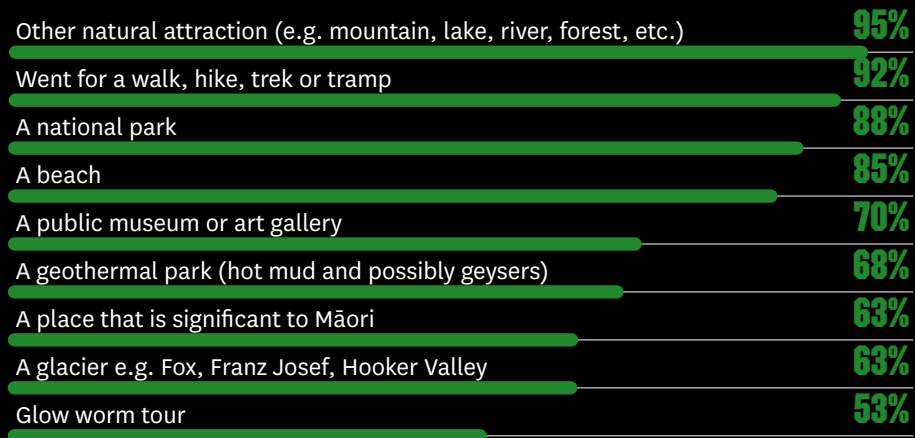
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TRAVELLER INSIGHTS

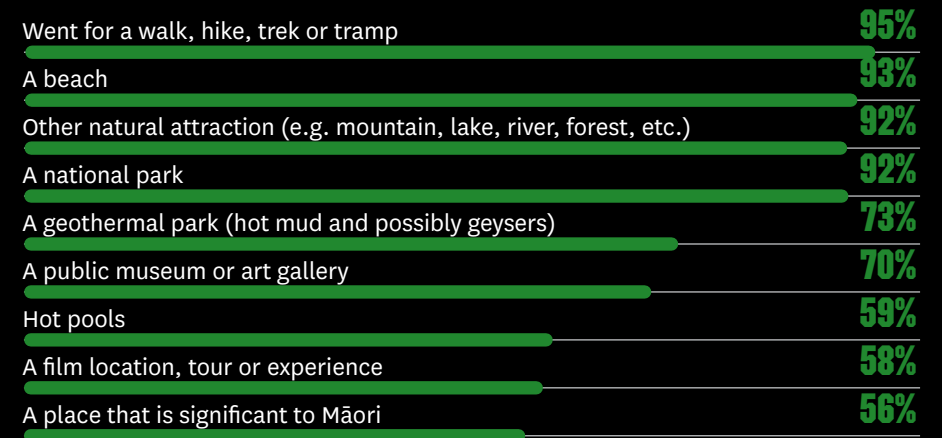


Most visitors favoured natural attractions like mountains and lakes, beaches, hiking, and national parks. Nearly 60% of visitors experienced hot pools during the off-peak season.

TOP ACTIVITIES ENJOYED BY GERMAN VISITORS IN NEW ZEALAND - SUMMER



TOP ACTIVITIES ENJOYED BY GERMAN VISITORS IN NEW ZEALAND - OFF-PEAK (MAR - NOV)



95%

Other natural attractions



92%

Walk, hike, trek or tramp



88%

A national park



95%

Walk, hike, trek or tramp



93%

A beach



92%

Other natural attractions

GERMANY

TRAVELLER INSIGHTS



Most visitors opted to book houses or apartments online or hotels. The North-to-South Island ferry, rental cars and taxis/shuttles were popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



53%

House/Apartment booked online (AirBnb etc)



46%

Hotel



34%

Other (paid) camping ground/holiday park



30%

Motel, Motor Inn or Serviced Apartment



27%

Backpackers



22%

With family or friends



21%

Free camping - staying in a tent, caravan, campervan/motorhome



20%

Bed and Breakfast



20%

Camping at a National Park/ Department of Conservation camping ground

MODES OF TRANSPORT



39%

The ferry between the North Island and the South Island



37%

Rental car



32%

Taxi/shuttle service



28%

Local bus service



16%

Plane (within New Zealand)



15%

Tour bus



14%

Other boat or ship



14%

Uber or other app based



13%

Bus service between towns/cities

OUR AUDIENCES

Our Active Considerers

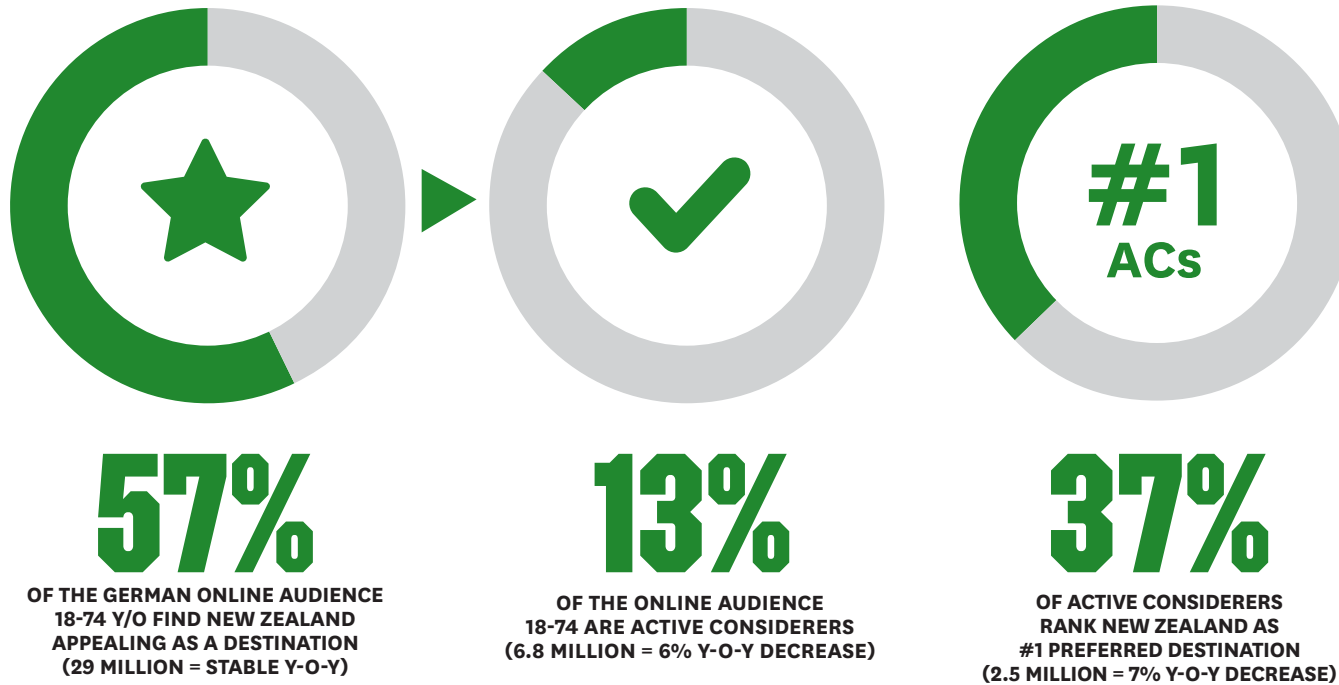
Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three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

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ACTIVE CONSIDERERS

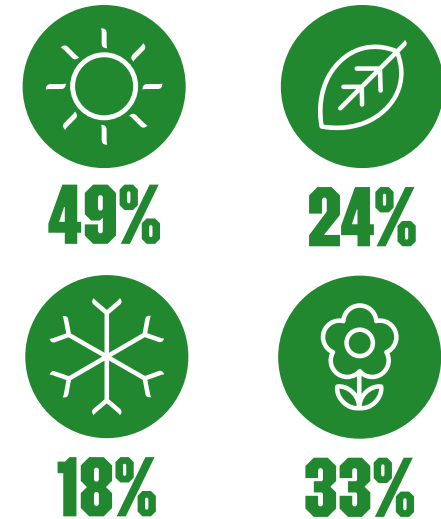


There are around 6.8 million Active Considerers in Germany, with 37% identifying New Zealand as their top destination choice.



SEASONAL CONSIDERATION

When would Active Considerers visit New Zealand (Non-exclusive)



TOTAL OFF-PEAK CONSIDERATION*



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.
Source: Active Considerer Monitor data 6-month period ending May 2024

*Percentage of active considerers who would consider visiting between March and November

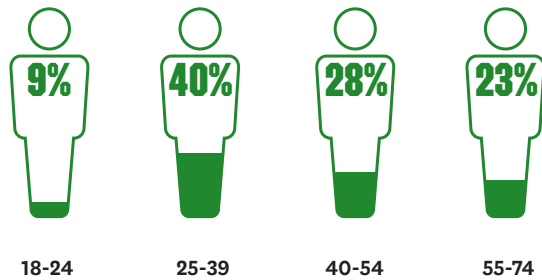


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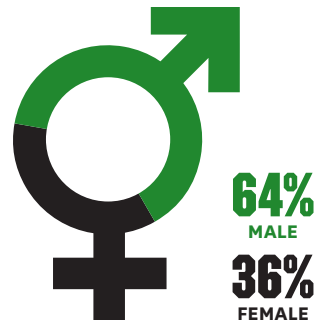
ACTIVE CONSIDERERS

Active Considerers skew 25-39, with over 40% living in Bavaria and North Rhine-Westphalia and 1 in 4 have a monthly household income of over €5,000.

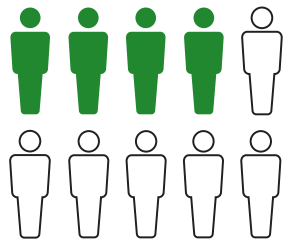
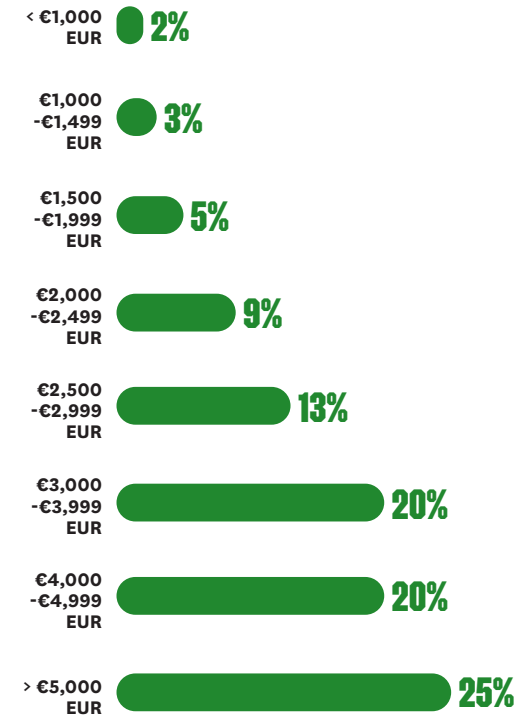
AGE SEGMENT OF ACTIVE CONSIDERERS



GENDER OF ACS



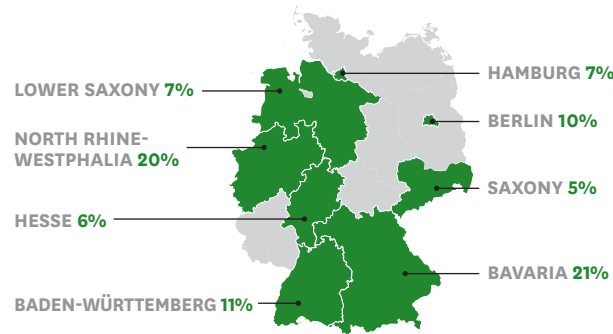
MONTHLY HOUSEHOLD INCOME SPREAD - ACS



4 IN 10 ACS ARE BETWEEN

25-39

REGIONAL SPREAD



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.

Source: Active Considerer Monitor data 6-month period ending May 2024

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ACTIVE CONSIDERERS



Among German Active Considerers, New Zealand is most associated with stunning landscapes, outdoor adventures, and experiences you can't find elsewhere in the world.

BRAND ASSOCIATIONS



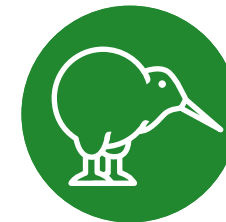
SPECTACULAR NATURAL
LANDSCAPES AND SCENERY

79%



OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES

75%



OFFERS EXPERIENCES THAT YOU
CANNOT GET ANYWHERE ELSE

74%



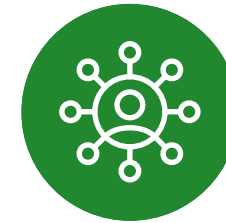
A PLACE YOU CAN ESCAPE FROM
THE ORDINARY

72%



I WOULD FEEL SAFE TRAVELLING
AROUND THIS DESTINATION

72%



OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES

72%



THE LOCALS ARE FRIENDLY AND
WELCOMING

71%



OFFERS OPPORTUNITIES TO
EXPERIENCE LOCAL CULTURE

70%



A DESTINATION THAT EMBRACES
VISITORS OF ALL CULTURES

70%

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.

Source: Active Considerer Monitor data 6-month period ending May 2024

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ACTIVE CONSIDERERS



Getting in touch with nature and experiencing New Zealand's beautiful landscapes are key reasons for German Active Considerers to visit.

REASONS TO VISIT NEW ZEALAND



TO GET IN TOUCH WITH NATURE

61%



TO EXPERIENCE BEAUTIFUL
LANDSCAPES/SCENERY

60%



TO LEARN & EXPLORE NEW THINGS

45%



TO FEEL A SENSE OF
ADVENTURE

44%



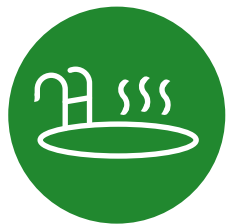
TO INTERACT WITH PEOPLE OF A
DIFFERENT CULTURE OR LIFESTYLE

40%



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

34%



TO FEEL RELAXED
AND REFRESHED

33%



TO INDULGE & PAMPER MYSELF

28%



TO HAVE FUN & ENJOY MYSELF

23%

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.

Source: Active Considerer Monitor data 6-month period ending May 2024

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ACTIVE CONSIDERERS



Active Considerers highly value the opportunity to taste local cuisine, visit national parks, and beaches, experience geothermal sites and explore main cities.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



TRYING LOCAL CUISINE
87%



VISITING NATIONAL PARKS, NATURE
RESERVES OR NATIVE FORESTS
86%



BEACHES & COASTS
86%



GEOTHERMAL SITES
85%



EXPLORING MAIN CITIES
84%



LAKES, RIVERS
AND WATERFALLS
84%



WILDLIFE EXPERIENCES
84%



EXPERIENCING
LOCAL TOWNS
83%



HISTORICAL SITES
AND HERITAGE SITES
83%

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.

Source: Active Considerer Monitor data 6-month period ending May 2024

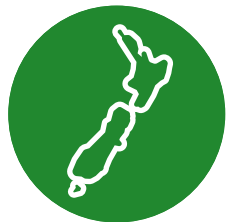
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ACTIVE CONSIDERERS



Key concerns and knowledge gaps for potential visitors from Germany include flight time to New Zealand, weather conditions, ease of travelling within New Zealand, and how welcoming the locals are.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND

38%



WHAT THE WEATHER IS LIKE

31%



HOW EASY IT IS TO TRAVEL AROUND

28%



HOW WELCOMING THE LOCALS ARE

28%



THE LENGTH OF TIME NEEDED TO EXPERIENCE NEW ZEALAND PROPERLY

26%



HOW SAFE IT IS TO PARTICIPATE IN ADVENTURE ACTIVITIES

25%



WHERE I SHOULD GET INFORMATION ABOUT ORGANISING A HOLIDAY

25%



HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS

23%



DRIVING ON THE LEFT HAND SIDE OF THE ROAD

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.

Source: Active Considerer Monitor data 6-month period ending May 2024

NGĀ MIHI